



Programs and Services Committee

MEETING AGENDA

Meeting Details

Date: Wednesday, July 26, 2023

Time: 1:00 p.m.

Location: Administrative Office
584 NW University Blvd.
Suite 100
Port St. Lucie, FL 34986

MS Teams Virtual Meeting Access:

Access Code: 496 421 922#

Phone: 772-800-5467

URL: [Click here to join the meeting](#)

Opening Remarks

1. Welcome & Attendance

Voting Items

2. Review and Approve WIOA Youth - Services Subrecipient Contract for PY2023-2024
3. Review and Approve WIOA Youth - Incentive Payment Policy Revisions
4. Review and Approve WIOA Youth - Supportive Policy Revisions
5. Review and Approve WIOA - Individual Training Account Policy Revisions

Information/Discussion

6. LWDB 20 Primary Indicators of Performance for Program Year (PY) 2022-2023 3rd Quarter
7. CareerSource Research Coast Programs/Services Updates
8. Adjournment

Next Program & Service Meeting – September 27, 2023

collaborate.
innovate.
lead.



AGENDA ITEM SUMMARY

| | |
|------------------------------|--|
| Title | Review and Approve WIOA Youth Services Subrecipient Contract for PY2023-2024 (PY 3 of 5) |
| Strategic Plans/Goals | Optimal Use of Resources |
| Policy/Plan/Law | Board Policy/Board Responsibility |
| Action Requested | Review and Approve the Renewal of WIOA Youth Services Subrecipient Contract for PY2023-2024 |
| Background | <p>CareerSource Research Coast entered into a multiple-year sub-recipient procurement for the provision of WIOA Youth Services.</p> <p>CSRC staff will report to the Board of Directors on the fiscal and programmatic risk evaluation and intent to renew the WIOA Youth Services contract with a current service provider or seek a new sub-recipient.</p> |
| Staff Recommendations | Review and Approve WIOA Youth Services Subrecipient contract for Program Year 2023-2024 |
| Supporting | Risk Evaluation Forms - Subrecipient Services |
| Board Staff | Shelly Batton Director of Programs/Equal Opportunity Officer sbatton@careersourcerc.com (866) 482-4473 ext. 518 |



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ECKERD CONNECTS, INC. (DUNS #08-068-1158)
 SUBRECIPIENT AGREEMENT: 20-002-YWS
 FAIN: 23A55AY000003
 ORIGINAL APPROVAL DATE: 6/28/2023
 CONTRACT BEGIN DATE: 7/1/2023
 CONTRACT END DATE: 6/30/2024

Subrecipient Agreement FOR THE SERVICE PROVIDER OF THE LOCAL WORKFORCE DEVELOPMENT AREA 20 CAREER CENTER SYSTEM

| | |
|---|---|
| Title 2 – Subtitle A – Chapter II – Part 200 – Subpart D - § 200.332: Requirements for pass-through entities. | |
| (a) The following sub-award information is provided by CSRC, the Pass-Through Entity, to Eckerd Connects, Inc., the Sub-Recipient. If/when any of these data elements changes, the change(s) will (also) be included in any subsequent sub-award modification(s). | |
| (1) Federal Award Identification. | |
| Sub-Recipient name (which must match the name associated with its unique entity identifier) | Eckerd Connects, Inc. |
| Sub-Recipient's unique entity identifier | DUNS # 080681158 |
| Federal Award Identification Number (FAIN) | AA-34762-20-55-A-12 AA-36313-21-55-A12 AA-38523-22-55-A-12 |
| Federal Award Date | July 1, 2023 |
| Sub-Award Period of Performance: start/end dates | July 1, 2023 – June 30, 2024 |
| Amount of Federal funds obligated by this action | \$800,000 |
| Total amount of Federal funds obligated to the Sub-Recipient | \$800,000 |
| Total amount of Federal Award to CSRC | \$890,940 |
| Federal award project description | WIOA Youth Services Provider |
| Name of Federal awarding agency Pass-through entity, and Contact information for awarding official | <u>Federal awarding agency:</u> For WIOA: U. S. Dept. of Labor through State of Florida, Dept. of Economic Opportunity <u>Pass Through Entity:</u> CareerSource Research Coast <u>Contact information:</u> Tracey McMorris, Vice President of Operations tmcmorris@careersourcerc.com |
| Assistance Listing Number | 17.259 -WIOA Youth |
| Is this sub-award for R&D? | No |
| Indirect Cost Rate | 23.44% |



THIS AGREEMENT is entered into between Workforce Development Board of the Treasure Coast, Inc, d/b/a CareerSource Research Coast, hereinafter referred to as “CareerSource Research Coast” (CSRC) and Eckerd Connects, Inc., hereinafter referred to as the “Service Provider.”

CONTRACT TERM

THIS AGREEMENT will be in effect from July 1, 2023 through June 30, 2024, provided the Service Provider meets CSRC performance expectations. All services must be delivered during this period to qualify as part of this agreement. Through this Agreement the Service Provider shall provide services for CSRC as described in the attached Statement of Work. None of these services may be subcontracted to another party without the knowledge and approval of CSRC.

In return, CSRC shall compensate the Service Provider for services rendered in an amount not to exceed **\$800,000** in accordance with the Payment Terms of this Agreement, unless otherwise modified by mutual consent of both parties.

This Agreement consists of the following attachments:

- Statement of Work
- Monitoring and Evaluation
- Technical Assistance and Guidance
- Payment Terms
- Budget
- Designation of Contract Personnel
- Signatory Authority
- Program Progress Report
- Certifications and Assurances
- Public Entity Crimes
- Certification Regarding Scrutinized Companies
- Certification Regarding Debarment, Suspension and Other Matters
- Anti-Lobbying Certification
- Non-discrimination and Equal Opportunity Provisions
- Certification Regarding a Drug-Free Workplace
- Certification Regarding Scrutinized Companies
- Local Definition for Youth Requiring Additional Assistance

CSRC will provide the Service Provider with copies of the Workforce Services Plan, other contracts and agreements governing programs and services outlined in the attached Statement of Work, and policies and procedures specific to WIOA Youth, as requested.



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SIGNATURES AND ATTESTATIONS

IN WITNESS THEREOF, the parties hereto have caused this AGREEMENT and Attachments to be executed by their undersigned officials as duly authorized.

**SERVICE PROVIDER – ECKERD
 CONNECTS, INC.**

**THE WORKFORCE DEVELOPMENT BOARD
 OF THE TREASURE COAST, INC. d/b/a CAREERSOURCE
 RESEARCH COAST**

 Name and Title of Certifying Representative

Brian K. Bauer, President/CEO

 Name and Title of Representative

 Signature

 Signature

 Date

 Date

DRAFT



ATTACHMENT A – STATEMENT OF WORK

PROGRAM SUMMARY: The Service Provider will provide program-based, workforce development activities and services to targeted youth at a contract value ratio of no less than 75% of funds spent on Out-of-School Youth and no more than 25% of funds spent on In-School Youth as specified by WIOA regulations.

TARGET GROUPS:

Out-of-School Youth must be age 16-24, not attending any school, and meet one or more additional conditions, which may include:

- School dropout; within age of compulsory attendance but has not attended for at least the most recent complete school year calendar quarter; holds a secondary school diploma or recognized equivalent and is low income and basic skills deficient or an English language learner; subject to the juvenile or adult justice system; homeless, runaway, in foster care or aged out of the foster care system, eligible for assistance under section 477 of the Social Security Act, or in an out-of-home placement; pregnant or parenting; and individual with a disability; low income person who requires additional assistance, as defined by CareerSource Research Coast (CSRC), to enter and complete an educational program or to secure and hold employment.

In-School Youth must be age 14-21, attending school, low income, and meet one or more additional conditions, which could include:

- Basic skills deficient; English language learner; an offender; homeless, runaway, in foster care or aged out of the foster care system; pregnant or parenting; an individual with a disability; a person who requires additional assistance, as defined by CSRC, to enter and complete an educational program or to secure and hold employment.

OUTREACH & RECRUITMENT:

The Service Provider’s project staff will network within the three county Local Workforce Development Area 20 (LWDA 20) to outreach and form connections with partners/collaborators, social service organizations, and school districts to achieve required numbers. Total number served includes all applicable youth carried in from previous program year. The CSRC website will also be used as a tool to gather preliminary data for referral.

All outreach/marketing tools developed by the Service Provider for this purpose will be created in collaboration with CSRC staff and will brand as the CareerSource Research Coast Youth Connections program and will be submitted to the CSRC Communications Manager for final approval prior to use. Outreach and recruitment will be on-going to ensure a constant flow of youth entering and exiting the program.

ELIGIBILITY ASSESSMENT/WIOA REGISTRATION:

The Service Provider will provide services to the existing active carryover caseload of **78** young adults, consisting of 11 ISY and 67 OSY and will recruit and enroll at least **70** additional young adults, comprised of 53 OSY and 17 ISY during the 2023-2024 program year throughout the three-county area. The Service Provider will serve a total of **148** young adults (78 carry-forward + 70 new enrollments). Program will provide continuous enrollment and work to exceed enrollment goals as long as funding allows. An enrollment is defined by determining Workforce Investment Opportunity Innovation Act (WIOA) eligibility and creating participation in the State system.



All youth must be WIOA eligible in order to receive services in the Youth Connections program. Ineligible youth will be referred to other appropriate community resources and/or to CSRC for universal client services. The Service Provider will market, recruit, and collect eligibility paperwork to determine WIOA eligibility. This is tracked through a project management software and Employ Florida. The eligibility criterion adheres to the requirements as set forth by the WIOA legislation:

Out-of-School Youth must be age 16-24, not attending any school, and meet one or more additional conditions, which may include;

- School dropout; within age of compulsory attendance but has not attended for at least the most recent complete school year calendar quarter; holds a secondary school diploma or recognized equivalent and is low income and basic skills deficient or an English language learner; subject to the juvenile or adult justice system; homeless, runaway, in foster care or aged out of the foster care system, eligible for assistance under section 477 of the Social Security Act, or in an out-of-home placement; pregnant or parenting; and individual with a disability; low income person who requires additional assistance, as defined by CSRC , to enter and complete an educational program or to secure and hold employment.

In-School Youth must be age 14-21, attending school including postsecondary school, low income, and meet one or more additional conditions, which could include:

- Basic skills deficient; English language learner; an offender; homeless, runaway, in foster care or aged out of the foster care system; pregnant or parenting; an individual with a disability; a person who requires additional assistance, as defined by CSRC, to enter and complete an educational program or to secure and hold employment.

Further, by the guided interview process, it will be determined if the youth model will meet the youth customer's needs and interests. Not all youth will be suitable for Youth Connections. Project staff will gather all required eligibility documents, determine eligibility and input the information into Employ Florida. Files will be checked and reviewed by Service Provider management for eligibility and accuracy prior to being data entered into Employ Florida. An approved basic skills assessment (CASAS) will be used for basic skills assessment in order to establish standardized Literacy and Numeracy levels. Upon youth participation, the service provider will facilitate intake and assessments through appropriate resources, including CSRC's assessments to determine interests, values, aptitudes and preferences. The Service Provider will examine the participant's work experience and academic history to develop a list of current and potential career choices for participants. This will also help staff members in developing the Individual Service Strategy (ISS). If eligibility issues arise and cannot be satisfactorily resolved to the satisfaction of CSRC, disallowed costs from the sole negligence of the Service Provider will be repaid by Eckerd using nonfederal funds.

ASSESSMENT & DEVELOPMENT OF INDIVIDUAL SERVICE STRATEGIES:

With the cooperation and commitment of each young adult and their family whenever possible, an ISS will be developed and barriers to each student's success determined. The approved basic skills assessment will be used to get standardized Literacy and Numeracy levels. The Project staff will develop an individual plan that the student is aware of and agrees to. Other assessments will be utilized as deemed appropriate. These tools help our Career Coaches develop the ISS which is tracked using Employ Florida.



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GOAL SETTING & DOCUMENTATION PROCESS:

The Service Provider's Career Coaches will record all activities with a participant through timely and accurate case notes, CSRC's document management system (DocuPhase), applications, enrollments, goals (both planned and achieved), program outcomes, and follow-ups. The Service Provider's Manager or their designees will conduct case file reviews on a regular basis.

CASE MANAGEMENT:

Case management will be developed to encourage inter-organizational partnerships to maximize the utilization of resources to support the needs of the youth. The Service Provider will provide referrals in order to make sure that each student is getting the appropriate professional support as needed. This is all case noted in the Employ Florida and scanned into DocuPhase.

BASIC SKILLS/ALTERNATIVE SECONDARY:

The Service Provider will evaluate youth academic skills utilizing an approved basic skills assessment (CASAS) in reading and math. The youth's prior educational history and the results of the basic skills assessment will be utilized to identify methods and resources to assist the youth to improve literacy skills at least one educational functioning level each year. Youth will be offered the opportunity to enroll in adult education, English Language Learning (ELL), or GED classes to pursue a high school diploma.

The Service Provider will also offer a limited number of scholarships for participants to enroll in Penn Foster, an alternative secondary school that evaluates the youth's most recent high school transcript and will develop a learning plan that will establish a specific number of courses to be completed to earn a nationally recognized and accredited secondary diploma.

WORK READINESS SKILLS:

The Service Provider intends to utilize a range and variety of tools and resources to help youth attain and/or improve basic workforce readiness skills. These tools are used to tests students' skills, provide both pretests and posttests to make initial assessments and gauge student progress, create assignments based on students' pretest results, monitor student scores and completion of activities, produce reports for individual students and provide documentation which will be included in the case file.

Enrolled youth are eligible for CSRC approved incentive policies that includes up to \$600 for in-school youth and up to \$650 for out-of-school youth in achievement-based incentives. Incentive payments are subject to funding availability.



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INTERNSHIP/JOB SHADOWING:

The Service Provider will target 60 youth to participate in Internship with at least 85% completing the minimum of 140 hours. A minimum of 25% of regional allocation, or \$222,735.00 must be spent on Internship expenditures related to participant wages and incentives (YESS Class Completion, Job Shadowing and Internship Completion Bonus), staffing and other applicable costs dedicated to the development, execution and oversight of work-based learning activities. Students will have an opportunity to earn a wage set at \$13.00/hour, for a minimum of 140 hours, maximum of 192 hours, based on individual participant needs and goals, for paid Internship activities. Workers Compensation coverage will fall under the State of Florida's insurance policy for WIOA participants. The Service Provider will be responsible for providing guidance and information regarding the possible tax responsibilities to participants and families.

CREDENTIALS & TRAINING VOUCHERS:

The Youth Connections Program will prepare youth to attain State and Industry recognized credentials that can stand alone or stacked. The Service Provider also encourages and assists youth to obtain credentials and certifications through our partner agencies and schools. Youth will be provided multiple avenues to achieve credentials throughout the delivery of the program based on their Individual Service Strategy (ISS) and program related goals and outcomes.

The Youth Connections program will also offer scholarships for youth participants to pursue certifications in entry-level career paths within in- demand, high growth occupations. These certifications will require at least a 30-day training period.

SUPPORT SERVICES:

Support Services will be administered through the Service Provider via individual case circumstance then reviewed by Career Coaches and by the Service Provider project management staff. These requests, documented in Employ Florida case notes, will be processed for payment by Service Provider's fiscal department and documented in the student file in DocuPhase and in the monthly billing report.

FOLLOW-UP:

A year-round approach to case follow-up will be conducted. Carry forward follow-up caseload is estimated to be **45** young adults as of July 1, 2023 with additional clients moving into follow-up services monthly, based on last date of services, as defined by WIOA. Clients in follow-up will receive any of the 14 youth elements allowable in follow-up along with support and capture of required performance outcomes. Client may receive incentives up to \$150 for placement in employment or education during the follow-up portion of the program.

Follow-up services include, but are not limited to, tracking progress on the job, the development of increased skills and certifications, support services, financial literacy, and incentives to support retention and/or completion of education and employment services. The Service Provider will complete quarterly follow-ups and will specifically be tracking the 2nd and 4th quarter retention of employment or continuation of post-secondary placement after exit. The Service Provider will assist youth within the parameters of WIOA requirements and comply with the required follow up increments. This will all be entered and case noted in Employ Florida.



PARTNERSHIPS:

The Service Provider has established or is in the process of establishing partnerships with the following: Indian River State College, Treasure Coast Technical College, Children’s Service Council of Martin County, Children’s Service Council of St. Lucie County, 211/United Way, Children’s Home Society, Helping People Succeed, St. Lucie County Schools, Martin County Schools, Indian River County Schools, The Early Learning Coalitions for Indian River, Martin and St. Lucie Counties, Gifford Youth Activity Center, Tykes and Teens, Boys & Girls Club of Martin and St. Lucie Counties, Treasure Coast Homeless Service Council, Drug Free St. Lucie County, St. Lucie County Roundtable, Martin County Interagency Coalition, Pace Center for Girls, GraceWay Village, Treasure Coast Food Bank, Mustard Seed Ministries, Good Samaritan Center, Hope for Families, United Against Poverty, Department of Juvenile Justice, Gulfstream Goodwill Industries, Florida Department of Health Martin and St. Lucie County, Mary’s Home of the Treasure Coast, Ignite Youth Alliance and many other. Partnership reviews will be included with reports to the CSRC Board of Directors and in the final narrative report for the program year.

ROLES OF THE PARTNERS:

The Service Provider will provide overall project design, support and implementation of all required WIOA Youth program elements for the levels of service described in this statement of work. CSRC will assist the program by providing some office space, linkages to other services, and client access to computer resources. The Service Provider will ensure a high level of coordination and integration with CSRC. The Service Provider staff will work together with appropriate CSRC staff for a seamless delivery of all available services. Project staff will provide program eligibility, workshop training, linkages with business services for job development, and program outcomes.

Facilities:

Port St. Lucie

CareerSource Research Coast Career Center – 584 NW University Blvd, Suite 400, Port St. Lucie, FL 34986

Vero Beach

Treasure Coast Technical College-4680 28th Court Room 2-201, Vero Beach, FL 32967

Fort Pierce

Garden City Early Learning Academy Annex Rm. 14 – 2102 NW Ave Q, Fort Pierce, FL 34950

Martin County

CareerSource Research Coast Career Center-710 SE Central Pkwy, Stuart, FL 34994

These facilities conform to all codes and requirements and are ADA accessible or reasonable accommodations can be made. Facilities may provide temporary in-kind space for the duration or part of the program during the year.

WORK PLAN SERVICES AND ACTIVITIES:

Activities and services are designed to help youth develop lifelong skills and career pathways, while overcoming obstacles and barriers, through a seamless integration of services. The program will help lead WIOA eligible young adults to outcomes of career pathways and/or post-secondary education.



WIOA YOUTH PROGRAM SERVICES AVAILABLE:

The following WIOA youth program elements are made available to each youth during the program. These are independently driven by the participants needs. Any service needed will be identified in the ISS.

| 14 WIOA Required Youth Program Elements | Provider, or Referral Agency | Instructional Activities/Curriculum |
|--|--|---|
| 1. Tutoring, academic remediation; study skills training, and instruction leading to secondary school completion, including dropout prevention strategies | Eckerd / Public school partners | Computer based training/instructor facilitated, FSA and GED Practice, GED Prep materials, e.g. Khan Academy (online), Practice GED exams, and instructional teacher-aided tools that are also used as a one-to-one instructional resource with minimal guidance (online); 21 st Century Skills |
| 2. Alternative secondary school offerings | Eckerd/ Public school partners | Florida State Standards; Penn Foster |
| 3. Paid and unpaid Internships with an academic and occupational educational component | Eckerd/ Community Business partners, CBO's, FBO's | ECKERD Documented Internship activities; job shadow activity |
| 4. Occupational skills training with a focus on recognized postsecondary credentials and in-demand occupations | Eckerd / Approved Training Provider Partners | Various. Based on identified occupations/career fields on the Targeted Occupations List with Approved Training Providers |
| 5. Leadership development opportunities, including positive social behavior and soft skills, decision making, teamwork, etc. | Eckerd in connection with various community partner agencies and employers | Community service, peer-centered activities, Employability Skills, Life Skills curriculum that includes leadership development, health, nutrition, sexual behavior, and substance abuse prevention |
| 6. Supportive Services | Eckerd in connection with various partner agencies and/or employers | Independently driven by participant needs. Supportive services for educational training and employment activities such as gas cards, bus passes, emergency assistance, driver's license, state identification, professional clothing, background checks and childcare |
| 7. Adult mentoring for at least 12 months | Eckerd in connection with partner agencies and employers | Independently driven by participant needs. Case managed and documented. Includes recruitment of both community-based and employer-based mentors and partnership with established mentorship programs |



| | | |
|---|--|---|
| 8. Comprehensive guidance and counseling | Eckerd and/or community agencies | On-going intensive case management. Community/locally based programming |
| 9. Follow-up services no less than 12 months after exit | Eckerd | Independently driven by participant needs. Contact with employer, post-secondary entities, job retention coaching, academic support, incentives, support, career and education counseling. (Continuous service until participant has completed follow-up period of 12 months) |
| 10. Workforce Concurrent Education | Eckerd and/or community agencies | Independently driven by participant needs. Utilizing local workforce system, work readiness training, Partnership with post-secondary and local training providers and employers to encourage youth to see education as part of their career pathway |
| 11. Financial Literacy | Eckerd in connection with partner agencies | Independently driven by participant needs. Partnerships with local financial institutions |
| 12. Entrepreneurial Skills Training | Eckerd and/or community agencies | Independently driven by participant needs. Partnerships with local business and community-based business organizations |
| 13. Labor Market and Local Employment Information | Eckerd/CSRC | Independently driven by participant needs. Utilizing local workforce system; ongoing career pathway discussions to include LMI and local career opportunities |
| 14. Post-Secondary Preparation and Transition Services | Eckerd and/or community agencies | Independently driven by participant needs. Partnerships with post-secondary educational institutions and community organizations |

Summary of Main Components and Intent are as follows:

- **Outreach** - engaging caseload for increased participation and identification of new participants.
- **Assessment** – determining ‘suitability’ for successful participation and referral to other appropriate alternatives for youth who are not eligible or suitable for WIOA services.
- **WIOA Eligibility/Registration** - Compiling proper documentation for WIOA eligibility.
- **Case Management** – Actively engaging and managing the youth caseload and meticulous documentation in Employ Florida for progress toward activity/goal completion and positive outcomes.
- **High School Diploma/GED Attainment** – GED/High School Diploma preparation and attainment will be achieved by using various tools and resources AND through partnering with the school districts and college system.
- **Internship** – determining suitability for Internship/job shadowing and case managing all aspects of the placements; partnering with businesses, CBO’s, and the CSRC Business Services Unit to recruit meaningful work experience sites.
- **Credentials** – providing training for industry recognized credentials and linking WIOA participants to existing community resources for short term training that will lead directly to employment opportunities.



- **Follow-up Services** – Providing follow-up services for youth who exit during the 30, 60, and 90 days after exit and then continue in the 2nd, 3rd, and 4th quarter after exit to ensure program effectiveness.

GOALS:

- A. An average caseload of 148 active WIOA Youth will be served during program year 23-24. The number served includes carry in youth from previous program year, as well as newly eligible and enrolled youth. Service Provider will enroll a minimum of **70** new WIOA eligible youth between July 1st, 2023 and June 30th, 2024. 100% of all contracted enrollment of youth will be completed, accurately and timely, and entered in Employ Florida and Eckerd's data management system by 06/30/2024.
- B. A minimum of 85% of all contracted enrolled WIOA youth receiving training services (occupational skills activities, secondary or post-secondary activities, or on-the-job training activities) will successfully engage in documented skills gains. Skills gains are defined as:
 1. Training Milestone: Evaluations completed by an employer or training provider documenting the achievement of established milestones on-the-job training period. Employer/training provider evaluations completed during job shadowing activities or work experience/internship activities cannot be utilized to document a training milestone measurable skills gain.
 2. Skills Progression: Documentation showing the successful completion of an exam required for an occupation, satisfactory attainment of an element or an industry or occupational competency exam or other completion test required to obtain a credential.
 3. Attainment of a Secondary School Diploma or its Equivalent: Documentation showing the participant earned a high school diploma or its state-recognized equivalent.
 4. Educational Functioning Level: Results from a pre and post CASAS exam or other literacy numeracy test approved by the National Reporting System (NRS) showing an increase of at least one functional level in reading and/or math.
 5. Secondary or Post-Secondary Transcripts/Report Card: Report card/transcripts for one semester showing the client is achieving academic standards. Secondary school credits or secondary school Carnegie credits may be accepted.
 6. Other approved WIOA related work preparation attainments, as defined and approved by CSRC.
- C. A minimum of 80% of all contracted enrolled WIOA defined youth who are terminated from the contractor's program will be terminated with a WIOA defined positive exit of employment placement. In addition, 30% of contracted enrolled WIOA defined youth who are terminated from the contractor's program will be terminated with a WIOA defined positive exit of post-secondary placement. Youth terminated from program may be calculated in one or both outcome requirements, with appropriate documentation and entry of outcomes into Employ Florida.
- D. A minimum of 92% of all contracted WIOA defined youth enrolled in a training program will attain a degree, certificate, or occupational skills credential prior to termination from the WIOA program. The measure will be calculated as the total number of youth exited with credential divided by the total number of youth exited who have received training related services from the program each month. Data verified from EF report.
- E. A minimum of 60 youth will be placed into paid Internship opportunities with local employers. Of those placed, a minimum of 85% are required to successfully complete their Internship activity as defined by the youth completing a minimum of 140 hours (maximum 192 hours). Additionally, the internship may be considered successful if the internship ends due to direct hire employment with the internship site or an alternate employer for a higher wage.



- F. A minimum of \$222,735.00 will be charged as approved work-based learning related expenditures.
- G. Service Provider will document employer engagement by collecting a minimum of 40 employer surveys (direct hire or internships), 20 of which will be private business employers. Service Provider will obtain or retain at least 25 community employer partners as documented by internship agreements.

SUBCONTRACTS:

If the Service Provider needs to subcontract any services, the terms of the contract and payment for services rendered must meet WIOA guidelines and will remain the sole responsibility of the Service Provider. Funds to cover the cost of the service will be provided by CSRC through this contract. The Service Provider must not subcontract the entire youth activities program. Acceptable subcontracts may include assessment, transportation, instruction, and other program components better delivered by a source other than the Service Provider. The Service Provider must notify CSRC, in writing, 30 days prior to subcontracting any services not covered in this agreement.

REPORTS AND EVALUATION:

The Service Provider will submit a monthly report that includes, In-School and Out-of-School, performance and is to be submitted via email at the following intervals: (See Attachment I)

- By the 5th day of the following month;
- Upon completion of the programs*

*Note: In the final Internal Performance Report narrative comments related to program goals, outcomes and overall programs should be included.

RECORDKEEPING:

The Service Provider must maintain records on each participant in sufficient detail to demonstrate compliance with the relevant contractual criteria related to the training and employment as contained in this agreement. At a minimum, the case file must contain the following: eligibility documents, copies of attendance sheets and progress reports, pre and post assessment results, case notes, termination, disciplinary reports, copies of activities, credentials, or other documents of program activities completed by the participant, and other pertinent information needed to document participation, progress, and results. All case files must be scanned in DocuPhase.

The Service Provider’s Career Coaches will record all activities with a participant through timely and accurate case notes, applications, activity codes, goals, both planned and achieved, program outcomes, and follow ups. The Service Provider will enter all appropriate information into Employ Florida, the Work Certified Learning Management System and DocuPhase. Case management notes will be available to service providers throughout the system. The Service Provider will coordinate and process support services requests in accordance with CSRC policies and procedures. Service Provider will ensure that all staff attend training coordinated by CSRC or the State when available and provide documentation of such training to CSRC as requested. The Service Provider will maintain all files in accordance with the requirements of the contract with CSRC and established policies and laws.

The Service Provider must maintain financial records sufficient to account for all funds received from CSRC and spent for the program.



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All records will be made available to CSRC, state and federal officials, independent monitors and/or auditors. Records will be retained for a period of three years following the date of final expenditure report for this agreement or until all audit questions and concerns have been resolved, whichever is later.

INSURANCE:

The Service Provider will utilize worker's compensation insurance provided by the State of Florida for youth participants engaged in Internships or related activities. The Service Provide must carry commercial liability insurance of \$1 million or more, property insurance on equipment and other property belonging to CSRC, worker's compensation on staff employees, and a surety bond (minimum \$100,000 for faithful and honest performance or the average amount of funds on hand) on employees who process and expend funds related to this Agreement. CSRC must be named as an additionally insured on applicable liability policies and a copy of the proper insurance certificates must be submitted with signed copies of this Agreement within 30 days of project startup or prior to the advancement of funds.

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ATTACHMENT B – MONITORING & EVALUATION

CSRC staff and their subcontracted independent monitoring/audit provider and the State of Florida's Department of Economic Opportunity (DEO) will monitor the program for programmatic and fiscal accountability. Monitoring visits may include reviews of participant files, program activities, curriculum, progress reports, the Service Provider's financial records, etc., as necessary to ensure that the program meets the intent and guidelines of this agreement, and all applicable laws, rules and regulations.

At the end of the project, the Service Provider will provide CSRC with reports of performance measured against agreement terms. CSRC staff will verify that these reports are accurate and complete.

During monitoring, if the Service Provider is found to be out of compliance with the terms of this Agreement, WIOA, CSRC policies, or any other governing document, the Service Provider will complete a Corrective Action Plan. This plan will be in writing and submitted to CSRC within twenty (20) working days from the receipt of written notification from CSRC that corrective action is required. CSRC will either accept or reject this plan and will notify the Service Provider of its decision in writing.

The Service Provider will provide assistance and access to records to federal and state monitors conducting program reviews, as requested. If found out of compliance during these reviews, the Service Provider will provide CSRC with a written Corrective Action Plan addressing federal and state monitors' concerns.

All monitoring and Corrective Action plans will comply with state and federal regulations.

In addition, the Service Provider will monitor individual program performance to ensure compliance and fulfillment of established federal, state, and local performance objectives. These reports are consolidated by the Service Provider's Area Manager and summarized in a monthly report to the funding agency.

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ATTACHMENT C – TECHNICAL ASSISTANCE & GUIDANCE

CSRC will provide technical assistance and guidance to the Service Provider as requested in writing, or as the results of monitoring. Assistance will be provided in the areas of management, programmatic, and fiscal systems. CSRC staff, jointly with the Service Provider, will develop a written plan for technical assistance as follows:

- Conduct a Service Provider interview
- Identify areas where assistance is needed
- Identify and assign staff who are to be involved
- Set a timetable for completing assistance
- Establish benchmarks to be achieved

The Service Provider will participate in entrance and exit interviews with CSRC staff to facilitate planning and follow-up of technical assistance.

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ATTACHMENT D – PAYMENT TERMS

COMPENSATION & TIME PERIOD: CSRC will reimburse the Service Provider for expenses incurred during the performance of duties outlined in this agreement in the amount not to exceed \$800,000 for the Youth Connections Program, with the final invoice submitted to CSRC by July 15, 2024 unless otherwise modified. Under the terms of this contract payments may be made on a cost reimbursement basis in the amount not to exceed \$800,000 and not to exceed **33% or \$264,000** per quarter for the first three quarters. A maximum of 75% of the total contract funds will be utilized to serve Out-of-School Youth, with 25% to be utilized to serve In-School-Youth Cost will be paid in accordance with the budget on any line item. Monthly accruals are due by the 10th day of the month and billing (with backup) is due by the 15th. Electronic format is preferred. A ten percent (10%) variance may occur between line items with approval from CSRC.

MODIFICATION OF TERMS: The terms of this Agreement, including total compensation, may be modified by mutual consent of both parties if enrollments, agreed-upon services, funding availability or circumstances warrant change. Refer to General Provisions and Assurances. Total budget amount cannot be exceeded. Budget line-item variances under 10% of line item do not require Board Staff approval. Budget line-item variances over 10% of line item require advance approval from CSRC’s Chief Financial Officer and CSRC staff assigned to manage the contract.

CONDITIONS OF PAYMENT/PERFORMANCE STANDARDS: It is understood and agreed by both CSRC and the Service Provider that payment is for cost associated with serving WIOA eligible youth as negotiated and outlined on the Project Budget.

PERFORMANCE MEASURES: Service Provider will be required to meet the following performance guidelines as part of the contract requirements.

| Performance Benchmark Measure | Timeframe Reporting |
|---|-----------------------|
| Measurable Skills Gains- 85% | Upon receipt from DEO |
| Attainment of Degree or Certificate- 92% | Upon receipt from DEO |
| Internship Placement- 60 Youth | Monthly |
| Internship Successful Completions- 85% | Monthly |
| Median Earnings 2 nd Quarter After Exit - \$3300 | Upon receipt from DEO |
| Employment Rate – Second Quarter After Exit – 82% | Upon receipt from DEO |
| Employment Rate – Fourth Quarter After Exit – 80% | Upon receipt from DEO |
| ***Above performance goals are from previous program year. Goals will be updated upon receipt of new program year negotiated rates*** | |



1. **DEFINITIONS OF PERFORMANCE MEASURES:**

Note: for each definition below, The Service Provider's numbers for the purpose of this contract will be isolated from the numbers of other CareerSource Research Coast youth programs/projects .

A. **Skills Gains:** A minimum of 85% of all contracted enrolled WIOA youth receiving training services (occupational skills activities, secondary or post-secondary activities, or on-the-job training activities) will successfully engage in documented skills gains during each year of training related participation. Skills gains are defined as:

- **Training Milestone:** Evaluations completed by an employer or training provider documenting the achievement of established milestones on-the-job training period. Employer/training provider evaluations completed during job shadowing activities or work experience/internship activities cannot be utilized to document a training milestone measurable skills gain.
- **Skills Progression:** Documentation showing the successful completion of an exam required for an occupation, satisfactory attainment of an element or an industry or occupational competency exam or other completion test required to obtain a credential.
- **Attainment of a Secondary School Diploma or its Equivalent:** Documentation showing the participant earned a high school diploma or its state-recognized equivalent.
- **Educational Functioning Level:** Results from a pre and post CASAS exam or other literacy numeracy test approved by the National Reporting System (NRS) showing an increase of at least one functional level in reading and/or math.
- **Secondary or Post-Secondary Transcripts/Report Card:** Report card/transcripts for one semester showing the client is achieving academic standards. Secondary school credits or secondary school Carnegie credits may be accepted.
- Other approved WIOA related work preparation attainments, as defined and approved by CSRC.

B. **Attainment of Degree or Certificate:** Of all youth enrolled in a training program who exit, 92% will successfully attain an occupational skills credential/certification, Post-Secondary credential/certification, High School Diploma/GED or a state, industry or nationally recognized credential. The measure will include total number of youth exited with credential divided by the total number of youth who received training services during program participation who have exited from the program each month. Data verified from EF report.

C. **Internship Placement:** The service provider will target a minimum of 60 youth to be placed in an internship. Young adults will career explore and job shadow and have an opportunity to earn up to an average of \$2,496 during paid Internship activities.

Students will be paid \$13.00/hour, or current minimum wage, whichever is greater, for up to 32 hours/week for no more than 192 hours total based on individual participant needs and goals, for paid Internship activities. Worker's Compensation coverage will fall under the State's blanket coverage for WIOA participants. Wages in excess of \$600 a year may result in issuance of IRS Form 1099 and have tax liability for participants. The Service provider will provide guidance and information regarding the possible tax responsibilities to participants and families.



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A minimum of 27% of regional allocation of WIOA Youth funds spent on a quarterly basis will be specific to approved and allowable Internship activities, within budget guidelines. This will include staff hours specific to Internship development, engagement, and execution; youth related payments and fees (incentives as described under the Internship placement/Job Shadowing section in the summary of Main Components and Intent, wages, and payroll fees) directly related to youth engagement in Internship activities.

- H. **Internship Successful Completion:** Of the minimum 60 internship placements, 85% of the youth will successfully complete an internship defined as completing learning objectives associated with internship placement AND working a minimum of 140 hours but no more than 192 hours AND receiving an overall satisfactory rating from employer upon completion of internship activity. Additionally, the internship may be considered successful if the internship ends due to direct hire employment with the internship site or an alternate employer for a higher wage. Data verified from EF closed 400 or 425 cases and hours worked summary from internship tracker.
- D. **Median Earnings Second Quarter After Exit:** The median earnings of exited youth participants who are in unsubsidized employment during the second quarter after exit from the program will be \$3,300. Data will be verified from the DEO Performance Indicator reports.
- E. **Employment Rate 2nd Quarter After Exit:** Of all youth who exit, 82% will be successfully enrolled in education or training activities, or in unsubsidized employment, during the second quarter after exit from the program. Data will be verified from the DEO Performance Indicator reports.
- F. **Employment Rate 4th Quarter After Exit:** Of all youth who exit, 80% will be successfully enrolled in education or training activities, or in unsubsidized employment, during the fourth quarter after exit from the program. Data will be verified from the DEO Performance Indicator reports.

The Service Provider will be paid according to the negotiated terms for expenditures related to these deliverables and as costs are incurred. The Service Provider is expected to make reasonable progress toward contract goals. Reasonable progress shall mean that, at the time of monitoring, activity and outcomes are what they should be for the evaluation period.

Should it appear that reasonable progress is not being made, CSRC will require the Service Provider to implement corrective actions. If the problem is not corrected, this contract may be terminated. To receive payment, the Service Provider must submit invoices for allowable costs as outlined in the negotiated program budget. These total costs may not exceed an aggregate of \$800,000.

Invoices must reflect amounts paid and youth activities must be supported with attached copies of youth activities attendance sheets, pre and posttests, certificates, etc., as applicable to the activity. Documentation of costs must be maintained for monitoring and auditing by CSRC.

When invoices are received, CSRC staff will review them for accuracy and consistency with this Agreement. If the invoices are incomplete, lack documentation or are not in compliance with the Agreement, they will be returned to the Service Provider for correction. Reimbursement will not be made to the Service Provider until an acceptable invoice is received, verified, and processed.



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The Service Provider is responsible for maintaining accounting records related to this Agreement. These records will be audited by CSRC staff at the end of the Agreement. Any disallowed costs for which reimbursement has been made must be repaid by the Service Provider to CSRC within 30 days of written notification that a disallowed cost and reimbursement have occurred. Reimbursement cannot be made utilizing federal funds. Repayment must be in the form of a check for the amount owed. Costs may be disallowed if they are:

- Inconsistent with the goals and terms of this Agreement or WIOA law, or CSRC regulations; and/or
- Not traceable to an actual expense and participants from the designated target groups; and/or
- Not clearly documented with class rosters and payroll registers; and/or
- Incurred before the date of this Agreement.

Costs for personnel, travel, transportation, training, membership fees and youth activities must be listed separately on the invoice and the costs totaled. Copies of proper documentation of costs incurred must also be attached, i.e. payroll registers, cancelled checks, mileage, and training fees.

At no time will total payments exceed the total dollar amount specified in this Agreement.

The Service Provider must adhere to all WIOA, state, and CSRC policies and procedures related to procurement when securing goods or services for this agreement. Documentation of proper procurement must be maintained with each purchase and made available to federal, state and partnership monitors and auditors.

2. PERFORMANCE SANCTIONS:

CSRC may impose sanctions on the Service Provider depending on performance determined during monitoring and evaluation. Sanctions will be imposed if goals and objectives are not met. Sanctions may include immediate termination of the Agreement, a debarring of the Service Provider from future agreements or a reduction in enrollments. CSRC will determine the level of sanctions to be imposed.

3. METHOD AND TIME OF PAYMENT

The Service Provider will be mailed a check for the total allowable cost incurred upon receipt of proper, verified invoices.

Invoices will be paid promptly provided the invoice is correct, sufficient, that verifiable documentation is attached, and all costs are allowable based on the negotiated terms.

The last invoice must be submitted no later than July 15, 2024.

- ## **4. DEOBLIGATION:**
- The Service Provider is expected to meet the goals and objectives specified in this Agreement and to provide those services contained in the Statement of Work. CSRC will monitor these items and will terminate this Agreement if the Service Provider fails to provide the requested services and performance. If this Agreement is terminated, the funds will be de-obligated and awarded to an alternate provider or retained by CSRC.



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ATTACHMENT E – NEGOTIATED BUDGET FOR 2023-2024 YOUTH ACTIVITIES

PROJECT BUDGET:

| PY 23-24 WIOA Youth Budget Summary | |
|---|-------------------|
| Staff Labor | \$ 376,928 |
| Fringe Benefits | \$ 114,971 |
| Travel: Mileage | \$ 4,819 |
| Other Travel | \$ 4,175* |
| Employee Related | \$ 210 |
| Supplies / Consumables | \$ 2,650** |
| Software Licensing | \$ 4,350 |
| Communications | \$ 5,400 |
| Insurance / Professional Fees | \$ 11,600 |
| Client Related | \$ 187,193 |
| Indirect Cost | \$ 87,704 |
| TOTAL | \$ 800,000 |

**Includes additional staff attending Florida WF Summit and other professional development opportunities.*

***Includes existing software license that had previously been classified as client related costs, but was advised to move to operational costs.*

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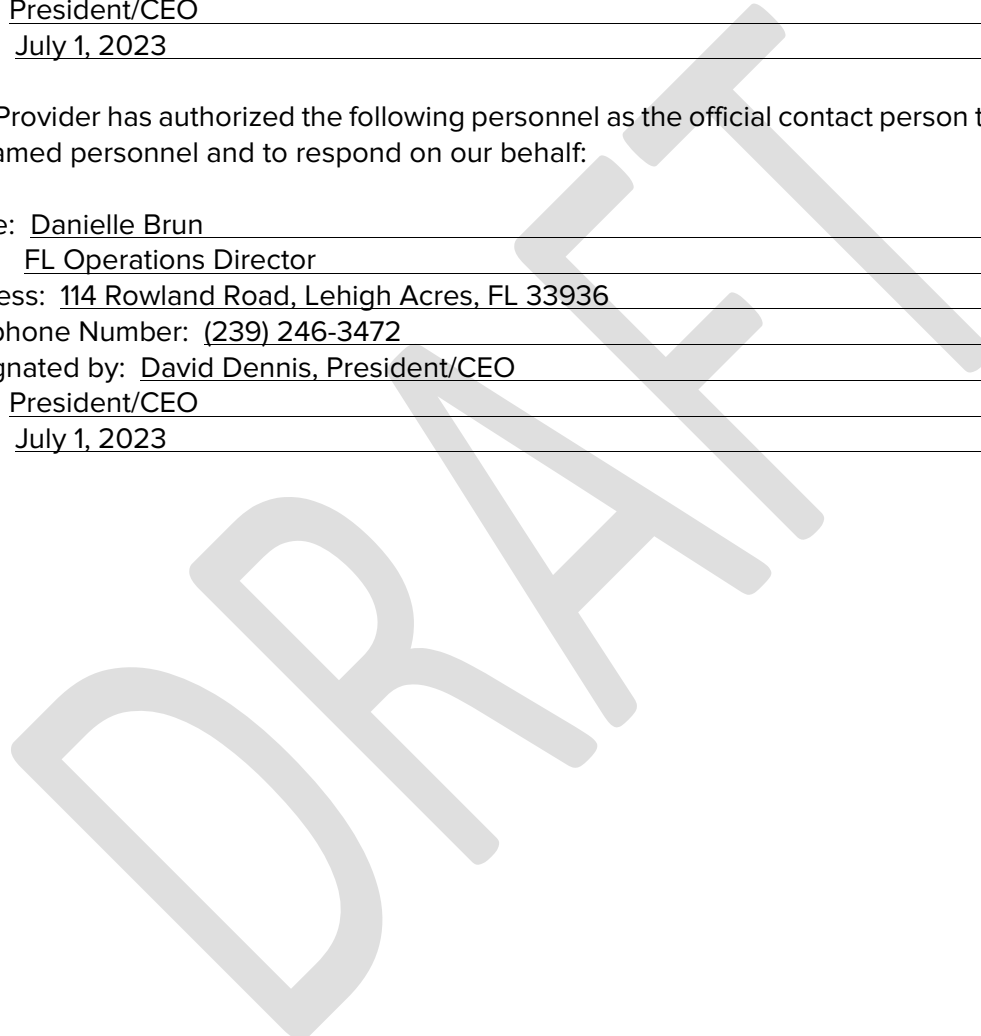
ATTACHMENT F – DESIGNATION OF CONTRACT PERSONNEL

CSRC has authorized the following personnel to administer this contract and give direction to the Service Provider:

Name: Christina Coble
Title: WIOA Programs Manager
Address: 584 NW University Blvd., Suite 100, Port St. Lucie, FL 34986
Telephone Number: (866) 482-4473 x. 617
Designated by: Brian Bauer
Title: President/CEO
Date: July 1, 2023

The Service Provider has authorized the following personnel as the official contact person to accept direction from the above-named personnel and to respond on our behalf:

Name: Danielle Brun
Title: FL Operations Director
Address: 114 Rowland Road, Lehigh Acres, FL 33936
Telephone Number: (239) 246-3472
Designated by: David Dennis, President/CEO
Title: President/CEO
Date: July 1, 2023





ATTACHMENT G – SIGNATORY AUTHORITY FOR INVOICES

The following individual(s) has/have been delegated signatory authority for invoices submitted under Agreement. Original signatures are required on this document and the invoice.

A. _____
Signature

Printed Name & Title

B. _____
Signature

Printed Name & Title

C. _____
Signature

Printed Name & Title

It is suggested that more than one individual be delegated signatory authority.

Service Provider’s Federal Identification No: 59-2551416

Provide official mailing address below if different from that provided in the Agreement:

Eckerd Connects, Inc.

500 S. Gravers Road

Plymouth Meeting, PA 19444



ATTACHMENT H – PROGRESS REPORTS

Monthly Performance Report

| Performance Measure | | PY23 - 24 Goal | Month Year | YTD Actual | YTD % Achieved |
|---|-----------------------------------|----------------|------------|------------|----------------|
| Enrollments | Out of School (OSY) Enrollments | 53 | | 0 | 0.00% |
| | In School (ISY) Enrollments | 17 | | 0 | 0.00% |
| | Total # Enrollments | 70 | | 0 | 0.00% |
| | % ISY Enrollments | 25% | | #DIV/0! | #DIV/0! |
| | Total # Open Cases as of EOM | N/A | | #DIV/0! | N/A |
| Work Experience | Internship Placements | 60 | | 0 | 0.00% |
| | Successful Internship Completions | 51 | | 0 | 0.00% |
| | Internship Completion Percentage | 85% | | 0.0% | 0.00% |
| | W/Ex Expenditures | \$222,735.00 | | | 0.00% |
| <i>Median Earnings - 2nd Quarter After Exit**</i> | | \$3,300.00 | | \$0.00 | 0.00% |
| <i>Employment Rate - 2nd Quarter After Exit**</i> | | 82.00% | | 0.00% | 0.00% |
| <i>Employment Rate - 4th Quarter After Exit**</i> | | 80.0% | | 0.00% | 0.00% |
| <i>Credential Attainment Rate</i> | | 92.00% | | \$0.00 | 0.00% |
| <i>Measurable Skills Gains</i> | | 85.00% | | \$0.00 | 0.00% |
| Global Exclusions | | N/A | 0 | | |

** Reported after the close of each quarter, when data is available from DEO



ATTACHMENT I – CERTIFICATIONS & ASSURANCES

This attachment is part of the vendor agreement held between The Workforce Development Board of the Treasure Coast, Inc. d/b/a CareerSource Research Coast (CSRC) and Vendor for described in the Agreement attached hereto. In consideration of the mutual covenant and stipulations set forth in the contract and Attachment herein, the parties hereby agree as follows:

1. COMPLIANCE WITH POLICIES AND LAWS

The warranty of this Section specifically includes compliance by Vendor with the provisions of the Immigration Reform and Compliance Act of 1986 (P. L. 99-603), the Workforce Innovation and Opportunity Act (WIOA), the provisions of the Workforce Investment Act of 1998, the Workforce Innovation Act of 2000, 45 CFR 98, the Temporary Assistance for Needy Families Program (TANF), 45 CFR parts 260-265 and other applicable federal regulations and policies promulgated thereunder and other applicable State, Federal, criminal and civil law with respect to the alteration or falsification of records created in connection with this Agreement. Office of Management and Budget (OMB) Circulars: Vendor agrees that, if applicable, it shall comply with all applicable OMB circulars, such as 2 CFR 200. Vendor will comply, as applicable, with the provisions of the Davis-Bacon Act (40 U.S.C. 276a to 276a7), the Copeland Act (40 U.S.C. 276c and 18 U.S.C. 874, and the Contract Work Hours and Safety Standards Act (40.327-333), regarding labor standards for federally assisted construction sub agreements.

2. CERTIFICATION REGARDING DEBARMENT, SUSPENSION AND OTHER MATTERS

Vendor certifies that it is not currently debarred, suspended, or excluded from or for participation in Federal assistance programs, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal department or agency within a three-year period preceding the effective date of the Agreement in accordance with 29 CFR Parts 45, 74, 95 and 98. No contract shall be awarded to parties listed on the GSA List of Parties Excluded from Federal Procurement or Non-Procurement Programs.

3. NON-DISCRIMINATION, EQUAL OPPORTUNITY ASSURANCES, CERTIFICATIONS, OTHER PROVISIONS

As a condition to the award of financial assistance from the Department of Labor under Title I of the WIOA, the grant applicant assures that it will comply fully with the nondiscrimination and equal opportunity provisions of the following laws:

- Section 188 of the Workforce Innovation & Opportunity Act (WIOA), which prohibits discrimination against all individuals in the United States based on race, color, religion, sex, national origin, age, disability, political affiliation, or belief, and against beneficiaries on the basis of either citizenship/status as a lawfully admitted immigrant authorized to work in the United States or participation in any WIA Title I- Financially assisted program or activity.
- Title VI of the Civil Rights Act of 1964, as amended, which prohibits discrimination on the basis of race, color, and national origin.
- Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against qualified individuals with disabilities.
- The Age Discrimination Act of 1975, as amended, which prohibits discrimination based on age.
- Title IX of the Education Amendments of 1972, as amended, which prohibits discrimination on the basis of sex in educational programs.
- Section 654 of the Omnibus Budget Reconciliation Act of 1981 prohibiting discrimination on the basis of race, creed, color, national origin, sex, handicap, political affiliation or beliefs.



- The American with Disabilities Act of 1990, P.L. 101-336 prohibiting discrimination in all employment practices, including the job application procedures, hiring, firing, advancement, compensation, training, and other terms, conditions, and privileges of employment. It applies to recruitment, advertising, tenure, layoff, leave, fringe benefits, and all other employment-related activities; and

The Vendor also assures that it will comply with 29 CFR Part 37 and all other regulation implementing the laws listed above.

For contracts more than \$10,000, the Vendor will comply with Executive Order 11246 of September 24, 1965, entitled "Equal Employment Opportunity" as amended by Executive Order 11375 of October 13, 1967, and supplemented on Department of Labor regulations at 41 CFR Chapter 60.

4. CERTIFICATION REGARDING CLEAN AIR ACT, WATER ACT, ENERGY EFFICIENCY AND ENVIRONMENTAL STANDARDS, SOLID WASTE

Clean Air and Water Act: When applicable, if this Contract is more than \$100,000, Vendor shall comply with all applicable standards, orders or regulations issued under the Clean Air Act as amended (42 U.S.C. 7401), Section 508 of the Clean Water Act as amended (33 U.S.C. 1368 et seq.), Executive Order 11738 and Environmental Protection Agency regulations (40 CFR Part 15). The Vendor shall report any violation of the above to the contract manager. Energy Efficiency: The Vendor shall comply with mandatory standards and policies relating to energy efficiency which are contained in the State of Florida's Energy Conservation Plan issued in compliance with the Energy Policy and Conservation Act (Public Law 94-163).

Vendor will comply with environmental standards which may be prescribed pursuant to the following: (a) institution of environmental quality control measures under the National Environmental Policy Act of 1969 (P.L. 91-190) and Executive Order (EO) 11514; (b) notification of violating facilities pursuant to EO 11738; (c) protection of wetlands pursuant to EO 11990; (d) evaluation of flood hazards in flood plains in accordance with EO 11988; (e) assurance of project consistency with the approved State management program developed under the Coastal Zone Management Act of 1972 (16 U.S.C. 1451 et seq.); (f) conformity of Federal actions to State (Clean Air) Implementation Plans under Section 176(c) of the Clean Air Act of 1955, as amended (42 U.S.C. 7401 et seq.); (g) protection of underground sources of drinking water under the Safe Drinking Water Act of 1974, as amended, (P.L. 93-523); and (h) protection of endangered species under the Endangered Species Act of 1973, as amended, (P.L. 93-205). The Vendor will comply with the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act (42 U.S.C. 6962).

5. CERTIFICATION REGARDING LOBBYING AND INTEGRITY

Vendor shall comply with the provisions of the Byrd Anti-Lobbying Amendment (31 U.S.C. 1352) 29 CFR Part 93. When applicable, if this Agreement is more than \$100,000, Vendor must, prior to contract execution, complete the Certification Regarding Lobbying Form.

6. CONFIDENTIALITY

It is understood that the Vendor shall maintain the confidentiality of any information, regarding CSRC customers and the immediate family of any applicant or customer, that identifies or may be used to identify them, and which may be obtained through application forms, interviews, tests, reports from public agencies or counselors, or any other source. Vendor shall not divulge such information without the written permission of the customer, except that such information which is



necessary as determined by CSRC for purposes related to the performance or evaluation of the Agreement may be divulged to

CSRC or such other parties as they may designate having responsibilities under the Agreement for monitoring or evaluating the services and performances under the Agreement, or to governmental authorities to the extent necessary for the proper administration of the law. All release of information shall be in accordance with applicable State laws, and policies of the CSRC. No release of information by Vendor, if such release is required by Federal or State law, shall be construed as a breach of this Section.

7. RIGHTS TO DATA/COPYRIGHTS AND PATENTS

CSRC, State of Florida and the U.S. Department of Labor shall have unlimited rights to inventions made under contract or agreement: Contracts or agreements for the performance of experimental, developmental, or research work shall provide for the rights of the Federal Government and the recipient in any resulting invention in accordance with 37 CFR part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements" and any implementing regulations issued by the awarding agency.

8. MONITORING

At any time and as often as CSRC, the State of Florida, United States Department of Labor, Comptroller General of the United States, the Inspector General of the United States and the State of Florida, or their designated agency or representative may deem necessary, Vendor shall make available all appropriate personnel for interviews and all financial, applicant, or participant books, documents, papers and records or other data relating to matters covered by this contract, for examination and/or audit, and/or for the making of excerpts or copies of such records for the purpose of auditing and monitoring activities and determining compliance with all applicable rules and regulations, and the provisions of this Agreement. The above referenced records shall be made available at the Vendor expense, at reasonable locations as determined by CSRC. Vendor shall respond in writing to monitoring reports and requests for corrective action plans within 10 working days after the receipt of such request from CSRC.

9. TERMINATION FOR DEFAULT/CONVENIENCE

This modified agreement may be terminated as follows:

- a. Either party may request termination of modified agreement upon 60 days prior written notice to the other party.
- b. CSRC may unilaterally terminate or modify this modified agreement, if for any reason either the U.S. Department of Labor or the State of Florida reduces funding through the grants under which this modified agreement is funded.
- c. CSRC may unilaterally terminate this modified agreement at any time that it is determined that:
 - i. Vendor fails to provide any of the services it has contracted to provide; or
 - ii. Vendor fails to comply with the provisions of this modified agreement; or
 - iii. Such termination is in the best interest of CSRC.
- d. Written notification of termination must be by registered mail, return receipt requested.

If Vendor disagrees with the reasons for termination, they may file a grievance in writing within ten days of notice of termination to the CSRC Executive Committee, who will conduct a grievance hearing and decide, from evidence presented by both parties, the validity of termination.

In the event this modified agreement is terminated for cause, Vendor shall be liable to CSRC for damages sustained for any breach of this modified agreement by the Vendor, including court costs and attorney fees, when cause is attributable to the Vendor.



In instances where Vendor violates or breaches modified agreement terms, CSRC will use all administrative, contractual, or legal remedies that are allowed by law to provide for such sanctions and penalties as may be appropriate.

10. PUBLIC ANNOUNCEMENTS AND ADVERTISING

Vendor agrees that when issuing statements, press releases, request for proposals, bid solicitation, and other documents describing the project or programs funded in whole or in part under this Agreement, Vendor shall clearly state: (1) the percentage of the total cost of the program or project which will be financed with Federal money under this Agreement and (2) the dollar amount of Federal funds for the project or program.

11. PUBLIC ENTITY CRIMES

Vendor shall comply with subsection 287 .L33(2)(a), F.S., whereby a person or affiliate who has been placed on the convicted Lessor list following a conviction for a public entity crime may not submit a bid, proposal, or reply on a contract to provide any goods or services to a public entity; may not submit a bid, proposal, or reply on a contract with a public entity for the construction or repair of a public building or public work; may not submit bids, proposals, or replies on leases of real property to a public entity; may not be awarded or perform work as a Lessor, supplier, sub-Lessor or consultant under a contract with any public entity and may not transact business with any public entity in excess of the threshold amount provided in section 287.Ot7, F.S., for Category Two for a period of thirty-six (36) months from the date of being placed on the convicted Lessor list.

12. THE PRO-CHILDREN ACT

Vendor agrees to comply with the Pro-Children Act of 1994, 20 U.S.C. 6083. Failure to comply with the provisions of the law may result in the imposition of civil monetary penalty up to \$1,000 for each violation and/or the imposition of an administrative compliance order on the responsible entity. This clause is applicable to all approved sub-contracts. In compliance with Public Law (Pub. L.) LO3-277, the Contract shall not permit smoking in any portion of any indoor facility used for the provision of federally funded services including health, day care, early childhood development, education, or library services on a routine or regular basis, to children up to age 18.

13. PROCUREMENT OF RECOVERED MATERIALS

Vendor agrees to comply with the provisions of section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act, and as supplemented by 2 CFR Appendix II to part 200 and 2 CFR part 200.323 and the requirements stated therein.

14. DOMESTIC PREFERENCES FOR PROCUREMENTS

Vendor agrees to comply with the provisions of 2 CFR Appendix II to part 200 and 2 CFR part 200.322 and the requirements stated therein.

15. PROHIBITION ON CERTAIN TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT

Vendor agrees to comply with the provisions of 2 CFR Appendix II to part 200 and 2 CFR part 200.216 and the requirements stated therein. See [Public Law 115-232](#), section 889 for additional information and 2 CFR part 200.471.



16. E-Verify

Vendor warrants and represents that it complies with section 448.095, F.S., where the State of Florida expressly requires the following:

- i. Every public employer, contractor, and subcontractor shall register with and use the E-Verify system to verify the work authorization status of all newly hired employees. A public employer, contractor, or subcontractor may not enter into a contract unless each party to the contract registers with and uses the E-Verify system.
- ii. A private employer shall, after making an offer of employment which has been accepted by a person, verify such person’s employment eligibility. A private employer is not required to verify the employment eligibility of a continuing employee hired before January 1, 2021. However, if a person is a contract employee retained by a private employer, the private employer must verify the employee’s employment eligibility upon the renewal or extension of his or her contract. As of July 1, 2023, all private employers in Florida with 25 or more employees will be required to use E-Verify, the federal government's database for verifying work authorization.

17. Free Speech and Religious Liberty (applicable to Sub-recipients only)

Vendor agrees to follow the statutory and national policy requirements, as applicable, stated in 2 CFR § 200.300 and Executive Order 13798 Promoting Free Speech and Religious Liberty and Executive Order 13864 Improving Free Inquiry, Transparency and Accountability at College and Universities.

Vendor Name: _____

Authorized Representative

Printed Name & Title: _____

Authorized Representative

Signed Name & Title: _____ Date: _____



ATTACHMENT J - SWORN STATEMENT PURSUANT TO SECTION 287.133 (3) (a), FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement is submitted to: The Workforce Board of the Treasure Coast, Inc. d/b/a CareerSource Research Coast

by _____
(print individual's name and title)

for _____
(print name of entity submitting sworn statement)

whose business address is _____

and (if applicable) its Federal Employer Identification Number is _____ if the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement.)

2. I understand that a "public entity crime" as defined in Paragraph 287.133 (1) (g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or of the United States, including, but not limited to, any bid or contract for goods or services to be provided to any public entity or an agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.

3. I understand that "convicted" or "conviction" as defined in Paragraph 287.133 (1) (b), Florida Statutes, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as result of a jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.

4. I understand that an "affiliate" as defined in Paragraph 287.133 (1) (a), Florida Statutes, means:
a. A predecessor or successor of a person convicted of a public entity crime; or
b. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

5. I understand that a "person" as defined in Paragraph 287.133 (1) (e), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and which bids or applies to bid on contracts for the provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.



6. Based on information and belief, the applicable statement which I have marked below is true in relation to the entity submitting this sworn statement.

- Neither the entity submitting this sworn statement, nor any of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, nor any affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.
- The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.
- The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989; however, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the Final Order entered by the Hearing Officer determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list. Attached is a copy of the final order.

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH 1 (ONE) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND, THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED, OR THROUGH THE END OF THE CONTRACT FOR WHICH IT IS BEING SIGNED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, FLORIDA STATUTES FOR CATEGORY TWO OF ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.

Signature: _____

Date: _____

NOTARY PUBLIC

STATE OF _____ COUNTY OF _____

PERSONALLY APPEARED BEFORE ME, the undersigned authority, _____
 (name of individual signing)

who, after first being sworn by me, affixed his/her signature in the space provided above on

this _____ day of _____, _____.

My commission expires: _____



ATTACHMENT K - CERTIFICATION REGARDING DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITY MATTERS

1. The Service Provider certifies to the best of its knowledge and belief, that it and its principal:
 - A. Are not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any federal department or agency.
 - B. Have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) transaction or contract under a public transaction, violation of federal or state antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statement, or receiving stolen property;
 - C. Are not presently indicated for or otherwise criminally or civilly charged by a government entity (federal, state, or local) with commission of any of the offenses enumerated in paragraph (1)(B) of this certification; and
 - D. Have not within a three-year period preceding this application/proposal/contract had one or more public transactions (federal, state, or local) terminated for cause or default.
2. Where the prospective primary participant is unable to certify to any of the statements in this certification, such prospective participant shall submit an explanation to CSRC.

Service Provider

Name and Title of Certifying Representative

Signature of Certifying Representative

Date



ATTACHMENT L - BYRD ANTI-LOBBYING CERTIFICATE

Certification for Contracts, Grants, Loans, and Cooperative Agreements (to be submitted with each bid or offer exceeding \$100,000)

APPLICABLE TO THIS CONTRACT: Yes: No:

The undersigned Service Provider certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for making lobbying contacts to an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form--LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions as amended by "Government wide Guidance for New Restrictions on Lobbying," 61 Fed. Reg. 1413 (1/19/96).

(3) The undersigned shall require that the language of this certification be included in the award documents for all sub-awards at all tiers (including subcontracts, sub-grants, and contracts under grants, loans, and cooperative agreements) and that all sub-recipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by 31, U.S.C. § 1352 (as amended by the Lobbying Disclosure Act of 1995). Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Pursuant to 31 U.S.C. § 1352(c)(1)-(2)(A), any person who makes a prohibited expenditure or fails to file or amend a required certification or disclosure form shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such expenditure or failure.

The Service Provider, **Eckerd Connects, Inc.**, certifies or affirms the truthfulness and accuracy of each statement of its certification and disclosure, if any. In addition, the Service Provider understands and agrees that the provisions of 31 U.S.C. A 3801, *et seq.*, apply to this certification and disclosure.

Name and Title of Certifying Representative

Signature of Certifying Representative

Date



ATTACHMENT M - NONDISCRIMINATION AND EQUAL OPPORTUNITY PROVISIONS ASSURANCE STATEMENT

As a condition to the award of financial assistance from the Department of Labor under Title I of the WIOA, the grant applicant assures that it will comply fully with the nondiscrimination and equal opportunity provisions of the following laws:

- Section 188 of the Workforce Innovation & Opportunity Act (WIOA), Which prohibits discrimination against all individuals in the United States on the basis of race, color, religion, sex, national origin, age, disability, political affiliation or belief, and against beneficiaries on the basis of either citizenship/status as a lawfully admitted immigrant authorized to work in the United States or participation in any WIA Title I- Financially assisted program or activity;
- Title VI of the Civil Rights Act of 1964, as amended, which prohibits discrimination based on race, color, and national origin.
- Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against qualified individuals with disabilities.
- The Age Discrimination Act of 1975, as amended, which prohibits discrimination based on age.
- Title IX of the Education Amendments of 1972, as amended, which prohibits discrimination based on sex in educational programs.
- Section 654 of the Omnibus Budget Reconciliation Act of 1981 prohibiting discrimination based on race, creed, color, national origin, sex, handicap, political affiliation or beliefs.
- The American with Disabilities Act of 1990, P.L. 101-336 prohibiting discrimination in all employment practices, including the job application procedures, hiring, firing, advancement, compensation, training, and other terms, conditions, and privileges of employment. It applies to recruitment, advertising, tenure, layoff, leave, fringe benefits, and all other employment-related activities; and

The Service Provider also assures that it will comply with 29 CFR Part 37 and all other regulation implementing the laws listed above.

For construction contracts in excess of \$10,000, the Service Provider will comply with Executive Order 11246 of September, 24, 1965, entitled "Equal Employment Opportunity" as amended by Executive Order 11375 of October 13, 1967, and supplemented on Department of Labor regulations at 41 CFR Chapter 60.

Failure to comply with these provisions may result in termination of any contract or agreement with CSRC.

I certify that I have read the above statement and on behalf of **Eckerd Connects, Inc.** agree to comply fully with the provisions contained therein.

Name and Title of Certifying Representative

Signature of Certifying Representative

Date



ATTACHMENT N - DRUG-FREE WORKPLACE REQUIREMENT CERTIFICATION

Pursuant to the Drug-Free Workplace Act of 1988, and its implementing regulations codified at 29 CRF 98, Subpart

F, I _____ the undersigned, in representation of **Eckerd Connects, Inc.**, attest and certify that the grantee will provide a drug-free workplace by:

1. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the grantee's workplace and specifying the actions that will be taken against employees for violation of such prohibition.
2. Establishing an ongoing drug-free awareness program to inform employees about:
 - (a) The dangers of drug abuse in the workplace.
 - (b) The grantee's policy of maintaining a drug-free workplace.
 - (c) Any available drug counseling, rehabilitation, and employee assistance programs; and
 - (d) The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace.
3. Making it a requirement that each employee engaged in the performance of the grant be given a copy of the statement required by paragraph (1).
4. Notifying the employee in the statement required by paragraph (1) that, as a condition of employment under the grant, the employee will:
 - (a) Abide by the terms of the statement; and
 - (b) Notifying the employer in writing of his or her conviction for a violation of a criminal drug statute occurring in the workplace no later than five calendar days after such conviction.
5. Notifying the agency in writing ten calendar days after receiving notice under subparagraph (4)(b) from an employee or otherwise receiving actual notice of such conviction. We will provide such notice of convicted employees, including position title, to every grant officer on whose grant activity the convicted employee was working. The notice shall include the identification number(s) of each affected grant.
6. Taking one of the following actions, within 30 calendar days of receiving notice under subparagraph 4(b), with respect to any employee who is so convicted:
 - (a) Taking appropriate personnel action against such an employee, up to and including termination, consistent with the requirements of the Rehabilitation Act of 1973 as amended; or
 - (b) Requiring such employee to participate satisfactorily in a drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State, or local, health, law enforcement, or other appropriate agency.
7. Making a good faith effort to continue to maintain a drug-free workplace through implementation of paragraphs (1), (2), (3), (4), (5), and (6).
8. Notwithstanding, it is not required to provide the workplace address under the grant. As of today, the specific sites are known and we have decided to provide the specific addresses with the understanding that if any of the identified places change during the performance of the grant, we will inform the agency of the changes.



The following are the sites for the performance of work done in connection with the specific grant including street address, city, county, state, and zip code:

Check () if there are workplaces on file that are not identified here.

Check () if an additional page was required for the listing of the workplaces.

I declare, under penalty of perjury under the laws of the United States, and under the penalties set forth by the Drug-Free Workplace Act of 1988, that this certification is true and correct.

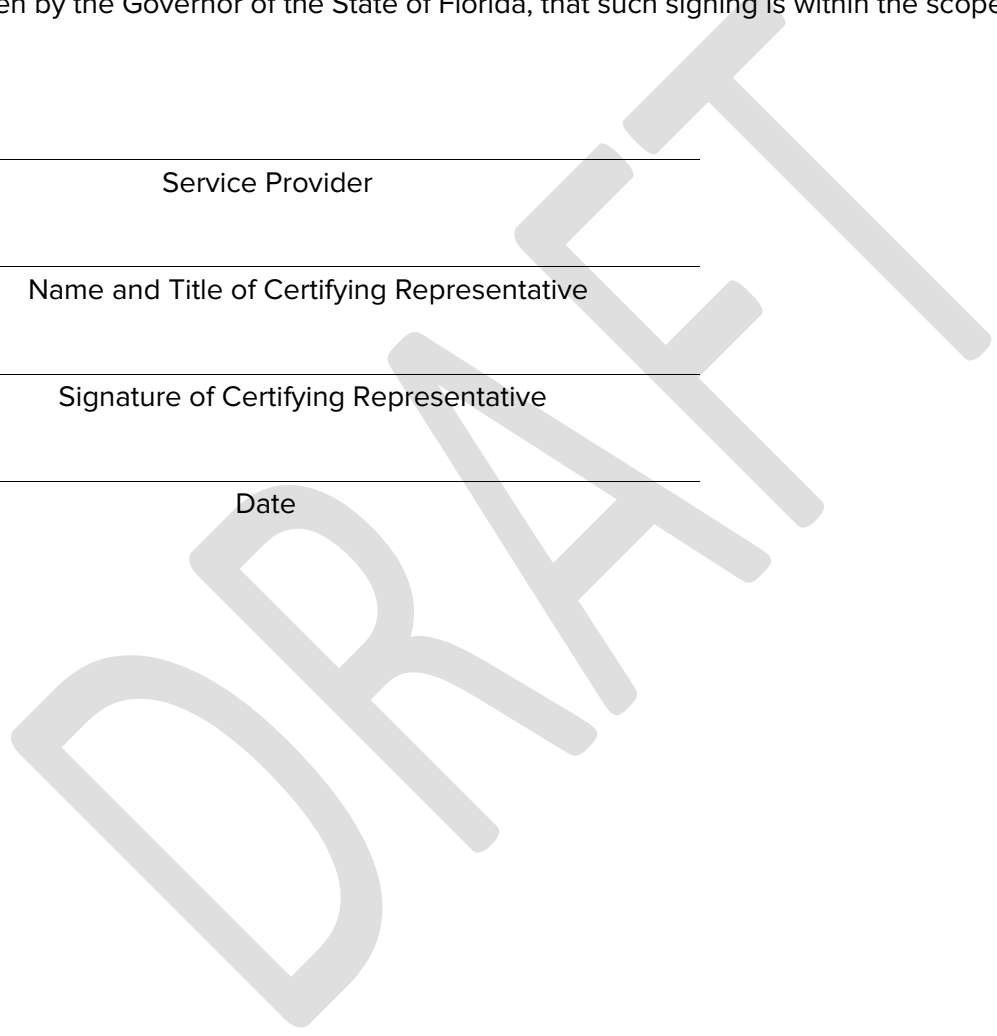
I certify that I who sign this Drug-Free Workplace Certification on behalf of the Service Provider, do so by the authority given by the Governor of the State of Florida, that such signing is within the scope of my powers.

Service Provider

Name and Title of Certifying Representative

Signature of Certifying Representative

Date





ATTACHMENT O - CERTIFICATION REGARDING SCRUTINIZED COMPANIES

Section 287.135(2)(a), Florida Statutes, prohibits a company from bidding on, submitting a proposal for, or entering into or renewing a contract for goods or services of any amount if, at the time of contracting or renewal, the company is on the Scrutinized Companies that Boycott Israel List, created pursuant to section 215.4725, Florida Statutes, or is engaged in a boycott of Israel. Section 287.135(2)(b), Florida Statutes, further prohibits a company from bidding on, submitting a proposal for, or entering into or renewing a contract for goods or services over one million dollars (\$1,000,000) if, at the time of contracting or renewal, the company is on either the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, both created pursuant to section 215.473, Florida Statutes, or the company is engaged in business operations in Cuba or Syria.

As the person authorized to sign on behalf of _____,

I hereby certify that the statement selected below is true: (Service Provider)

The Service Provider

- i. Is not engaged in a boycott of Israel **and**
- ii. Is not on the Scrutinized Companies that Boycott Israel List **and**
- iii. Is not on the Scrutinized Companies with Activities in Sudan List **and**
- iv. Is not on the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List **and**
- v. Has not engaged in business operations in Cuba or Syria.

The Service Provider meets the conditions for exemption as provided in section 287.135(4), Florida Statutes.

I understand that pursuant to section 287.135, Florida Statutes, the submission of a false certification may subject the company to civil penalties, attorney’s fees, and/or costs. I further understand that any contract with Workforce Development Board of the Treasure Coast d/b/a CareerSource Research for goods or services of any amount may be terminated if the Service Provider is found to have submitted a false certification may subject the company to civil penalties, attorney's fees, and/or costs. I further understand that any contract for goods or services may be terminated if the Service Provider is found to have submitted a false certification or has been placed on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List or been engaged in business operations in Cuba or Syria.

Name and Title of Certifying Representative

Signature of Certifying Representative

Date



ATTACHMENT P – LOCAL DEFINITION FOR YOUTH REQUIRING ADDITIONAL ASSISTANCE TO COMPLETE AN EDUCATION PROGRAM OR TO SECURE AND HOLD EMPLOYMENT

LWDB 20 defines "A low- income individual who requires additional assistance to enter or complete an educational program or to secure or hold employment" as a youth that meets Federal guidelines for low income and also meets one or more of the following criteria:

1. Youth that have one or more biological parent incarcerated, institutionalized, or sentenced by a court of law to incarceration/institutionalization for more than one year. Documentation must be provided by court, institution, or the Department of Corrections.
2. Youth that have been victims of domestic violence or intimate partner violence as documented by law enforcement or domestic violence organization.
3. Youth that are documented gang members as defined and documented by local law enforcement.
4. Youth that are residing in a high poverty area as defined by census tract records showing area of youth's residence as having a poverty rate of 25% or greater.
5. Youth that are over age 21 and have no work history or have poor work history as defined by the lack of employment for more than 180 consecutive days as documented by employer records, pay records, or State system (Suntax).
6. Youth at risk of dropping out of high school due to grades/credits/ attendance/not passing proficiency exams or has had an out of school suspension or expulsion from school.
7. Is attending an alternative school/education program or has been enrolled in an alternative school within the past 12 months.

In accordance with WIOA guidelines, ISY youth applying for the WIOA youth program as a "youth requiring additional assistance" must also meet income guidelines for WIOA enrollment. CareerSource Research Coast utilizes federal/state/local agency documentation sources as validation of the "youth requiring additional assistance" barrier whenever possible but may accept an applicant statement/self-attestation in extenuating circumstances.

AGENDA ITEM SUMMARY

| | |
|------------------------------|---|
| Title | Review and Approve Revisions to the WIOA Youth - Incentive Payments Policy |
| Strategic Plans/Goals | Optimal Use of Resources |
| Policy/Plan/Law | Workforce Innovation & Opportunity Act |
| Action Requested | Review and Approve Revisions to the WIOA Youth - Incentive Payments Policy Revisions |
| Background | WIOA regulations authorize the use of incentive payments for youth participants. Incentive payments are allowable for recognition and achievements directly tied to training activities, education, and work experience. Local Workforce Development Boards are tasked with determining the value of the incentive payments and to create policies governing their use. |
| Staff Recommendations | Review and Approve the WIOA Youth - Incentive Payments Policy Revisions |
| Supporting Material | WIOA Youth - Incentive Payments Policy Revisions |
| Board Staff | Christina Coble WIOA Programs Manager ccoble@careersourcerc.com (866) 482-4473 ext. 617 |



PURPOSE

To establish a uniform standard for providing incentive payments to Workforce Innovation and Opportunity Act (WIOA) Youth Program participants of CareerSource Research Coast (CSRC).

REFERENCE

20 CFR 681.640. U.S. Department of Labor Training and Employment Guidance Letter No. 21-16.

BACKGROUND

WIOA regulations authorize the use of incentive payments for youth participants. Unlike supportive services, incentives are permitted for recognition and achievements directly tied to training activities, education, and work experience. In addition, Local Workforce Development Boards may determine the value of the incentive payments and create policies related to their use. Achievements completed prior to WIOA Youth enrollment do not qualify for incentives.

Opportunities for WIOA Youth to earn incentives must be outlined in writing and reviewed with the participant to ensure a thorough understanding of program requirements. Supporting documentation of the activities completed or milestones achieved must be documented in the participant’s file as verification of achievement.

LOCAL POLICY

For CSRC, In-School Youth (ISY) participants are limited to a maximum incentive earnings of \$600 and Out-of-School Youth (OSY) participants are limited to maximum incentive earnings of \$650 per program year. If extenuating circumstances require funding in excess of the allowable limits, exceptions may be made upon request by the WIOA Youth Program Manager to the CSRC staff overseeing the WIOA Youth Workforce Service Contract and approved by CSRC’s Chief Financial Officer.

Incentive payments are based on the availability of funding and may be declined, adjusted, and/or discontinued due to changes in funding, budgets, and contracts, without notice. A participant’s lack of satisfactory performance/progress or disciplinary issues may delay receipt of any/all incentives until resolved.

CSRC offers the incentives listed below to WIOA Youth participants as determined allowable and upon meeting the requirements listed for each. Complete details regarding specific requirements for each may be found on the OSY Youth Connections Incentive Sheet and ISY Youth Connections Incentive Sheet.

| Type | Description | Value | Limit Per Program Year | ISY, OSY, or Both |
|-------------------------|---|-------|------------------------|-------------------|
| Successful Grade Report | Submission of end of term grade report reflecting satisfactory progress in a current education program. | \$25 | Two | ISY |



WORKFORCE INNOVATION & OPPORTUNITY ACT YOUTH
INCENTIVE PAYMENTS POLICY

ORIGINAL APPROVAL DATE: 8/17/2021

REVISION DATE: ~~097/0819//20223~~

BOARD EFFECTIVE DATE: ~~1008/2630/20223~~

| Type | Description | Value | Limit Per Program Year | ISY, OSY, or Both |
|--|--|---------------------------|------------------------|-------------------|
| Success in Education | Attainment of Dean's List, Honor Roll, or Perfect Attendance reports in conjunction with a successful grade report | \$50 | One | ISY |
| YESS Class Completion | Completion of core modules of the YESS Work Readiness curriculum. | \$100 | One | Both |
| Job Shadowing | Completion of a minimum of ten- twelve documented hours "shadowing" a professional in the industry or field identified in the participant's career plan. | \$75 - OSY \$50- ISY | One - OSY Two - ISY | Both |
| Internship Completion | Completion of an internship for six-eight consecutive weeks working 140 hours minimum to 192 hours maximum. | \$150 | One | Both |
| Basic Skills Upgrade | Increase of at least one Educational Functioning Level. Must be basic skills deficient at the time of enrollment. | \$50 - OSY \$25 - ISY | Two | Both |
| Credentialing – Long term Occupational Skills Credential | Attainment of a state or nationally recognized certification requiring long-term academic or occupational skills upgrades/training. | \$100 | One | Both |
| Credentialing – GED/High School Diploma | Attainment of a state or nationally recognized high school diploma or GED. | \$200 -OSY \$150 - ISY | One | Both |
| Financial Literacy | Completion of an assigned Financial Literacy course. | \$25 | One | Both |
| Leadership/ Entrepreneurial Project | Planning and execution of an approved leadership/entrepreneurial project. | \$25 | One | Both |
| Education Exploration | Completion of at least one higher education institution visit. | \$25 | One | Both |



| Type | Description | Value | Limit Per Program Year | ISY, OSY, or Both |
|--|---|-------|------------------------|-------------------|
| Youth Positive Outcome- Entered Employment/Job Retention | Obtained employment, earned an industry-recognized credential if enrolled in a training activity, and gained a basic skills upgrade (if youth is basic-skills-deficient at enrollment). | \$150 | One | Both |
| Youth Positive Outcome- Enrolled in Post-Secondary Education or Occupational Skills Training | Earned an industry-recognized credential if enrolled in a training activity and enrollment/attendance in post-secondary education and gained a basic skills upgrade (if youth is basic-skills-deficient at enrollment). | \$150 | One | Both |
| Youth Positive Outcome- Enlisted in the Military | Earned an industry- recognized credential if enrolled in a training activity and enlisted in the military and gained a basic skills upgrade (if youth is basic-skills-deficient at enrollment). | \$150 | One | Both |
| Youth Positive Outcome- Enrolled in a State Approved Apprenticeship Program | Earned an industry-recognized credential if enrolled in a training activity and entered a state-approved apprenticeship and gained a basic skills upgrade (if youth is basic-skills-deficient at enrollment). | \$150 | One | Both |
| 2nd Quarter Employment Retention | Verification of employment or school attendance during the second quarter after program exit. | \$75 | One | Both |
| 4th Quarter Employment Retention | Verification of employment or school attendance during the fourth quarter after program exit. | \$75 | One | Both |

Referenced Documents:

- OSY Youth Connections Incentive Sheet
- ISY Youth Connections Incentive Sheet
- WIOA Youth Incentive Payments Procedure



PURPOSE

To establish a uniform standard for providing incentive payments to Workforce Innovation and Opportunity Act (WIOA) Youth Program participants of CareerSource Research Coast (CSRC).

REFERENCE

20 CFR 681.640. U.S. Department of Labor Training and Employment Guidance Letter No. 21-16.

BACKGROUND

WIOA regulations authorize the use of incentive payments for youth participants. Unlike supportive services, incentives are permitted for recognition and achievements directly tied to training activities, education, and work experience. In addition, Local Workforce Development Boards may determine the value of the incentive payments and create policies related to their use. Achievements completed prior to WIOA Youth enrollment do not qualify for incentives.

Opportunities for WIOA Youth to earn incentives must be outlined in writing and reviewed with the participant to ensure a thorough understanding of program requirements. Supporting documentation of the activities completed or milestones achieved must be documented in the participant’s file as verification of achievement.

LOCAL POLICY

For CSRC, In-School Youth (ISY) participants are limited to a maximum incentive earnings of \$600 and Out-of-School Youth (OSY) participants are limited to maximum incentive earnings of \$650 per program year. If extenuating circumstances require funding in excess of the allowable limits, exceptions may be made upon request by the WIOA Youth Program Manager to the CSRC staff overseeing the WIOA Youth Workforce Service Contract and approved by CSRC’s Chief Financial Officer.

Incentive payments are based on the availability of funding and may be declined, adjusted, and/or discontinued due to changes in funding, budgets, and contracts, without notice. A participant’s lack of satisfactory performance/progress or disciplinary issues may delay receipt of any/all incentives until resolved.

CSRC offers the incentives listed below to WIOA Youth participants as determined allowable and upon meeting the requirements listed for each. Complete details regarding specific requirements for each may be found on the OSY Youth Connections Incentive Sheet and ISY Youth Connections Incentive Sheet.

| Type | Description | Value | Limit Per Program Year | ISY, OSY, or Both |
|-------------------------|---|--------------|-------------------------------|--------------------------|
| Successful Grade Report | Submission of end of term grade report reflecting satisfactory progress in a current education program. | \$25 | Two | ISY |



| Type | Description | Value | Limit Per Program Year | ISY, OSY, or Both |
|--|--|---------------------------|------------------------|-------------------|
| Success in Education | Attainment of Dean's List, Honor Roll, or Perfect Attendance reports in conjunction with a successful grade report | \$50 | One | ISY |
| YESS Class Completion | Completion of core modules of the YESS Work Readiness curriculum. | \$100 | One | Both |
| Job Shadowing | Completion of a minimum of ten- twelve documented hours "shadowing" a professional in the industry or field identified in the participant's career plan. | \$75 - OSY \$50- ISY | One - OSY Two - ISY | Both |
| Internship Completion | Completion of an internship working 140 hours minimum to 192 hours maximum. | \$150 | One | Both |
| Basic Skills Upgrade | Increase of at least one Educational Functioning Level. Must be basic skills deficient at the time of enrollment. | \$50 - OSY \$25 - ISY | Two | Both |
| Credentialing – Long term Occupational Skills Credential | Attainment of a state or nationally recognized certification requiring long-term academic or occupational skills upgrades/training. | \$100 | One | Both |
| Credentialing – GED/High School Diploma | Attainment of a state or nationally recognized high school diploma or GED. | \$200 -OSY \$150 - ISY | One | Both |
| Financial Literacy | Completion of an assigned Financial Literacy course. | \$25 | One | Both |
| Leadership/ Entrepreneurial Project | Planning and execution of an approved leadership/entrepreneurial project. | \$25 | One | Both |
| Education Exploration | Completion of at least one higher education institution visit. | \$25 | One | Both |



| Type | Description | Value | Limit Per Program Year | ISY, OSY, or Both |
|--|---|-------|------------------------|-------------------|
| Youth Positive Outcome- Entered Employment/Job Retention | Obtained employment, earned an industry-recognized credential if enrolled in a training activity, and gained a basic skills upgrade (if youth is basic-skills-deficient at enrollment). | \$150 | One | Both |
| Youth Positive Outcome- Enrolled in Post-Secondary Education or Occupational Skills Training | Earned an industry-recognized credential if enrolled in a training activity and enrollment/attendance in post-secondary education and gained a basic skills upgrade (if youth is basic-skills-deficient at enrollment). | \$150 | One | Both |
| Youth Positive Outcome- Enlisted in the Military | Earned an industry- recognized credential if enrolled in a training activity and enlisted in the military and gained a basic skills upgrade (if youth is basic-skills-deficient at enrollment). | \$150 | One | Both |
| Youth Positive Outcome- Enrolled in a State Approved Apprenticeship Program | Earned an industry-recognized credential if enrolled in a training activity and entered a state-approved apprenticeship and gained a basic skills upgrade (if youth is basic-skills-deficient at enrollment). | \$150 | One | Both |
| 2nd Quarter Employment Retention | Verification of employment or school attendance during the second quarter after program exit. | \$75 | One | Both |
| 4th Quarter Employment Retention | Verification of employment or school attendance during the fourth quarter after program exit. | \$75 | One | Both |

Referenced Documents:

- OSY Youth Connections Incentive Sheet
- ISY Youth Connections Incentive Sheet
- WIOA Youth Incentive Payments Procedure

AGENDA ITEM SUMMARY

| | |
|------------------------------|--|
| Title | Review and Approve Revisions to WIOA Youth - Supportive Services Policy |
| Strategic Plans/Goals | Optimal Use of Resources |
| Policy/Plan/Law | Workforce Innovation & Opportunity Act |
| Action Requested | Review and Approve Revisions to the WIOA Supportive Services Policy Revisions |
| Background | The Workforce Innovation and Opportunity Act (WIOA) requires that WIOA participants have access to limited funds designated through program design to help them overcome barriers to employment. Supportive service payments are issued on a case-by-case basis and determined by the individual participant's needs under WIOA regulations. |
| Staff Recommendations | Approve revisions to the WIOA Youth - Supportive Services Policy Revisions |
| Supporting Material | WIOA Youth - Supportive Services Policy Revisions |
| Board Staff | Christina Coble WIOA Programs Manager ccoble@careersourcerc.com 1-866-482-4473 ext. 617 |



PURPOSE

To establish a uniform standard for providing supportive services to Workforce Innovation & Opportunity Act (WIOA) Youth program participants of CareerSource Research Coast (CSRC). To avoid duplication, WIOA Youth Program staff shall coordinate and provide cost-effective support services to participants by either connecting participants to other resources or when appropriate WIOA funding is available. CSRC shall authorize supportive services when a participant demonstrates the financial need, when the participant will not be successful without the support, and when no alternative funding is available to pay for such supportive service.

REFERENCES

Section 129 of the Workforce Innovation & Opportunity Act. WIOA Desk Reference; Supportive Services, June 2017 Edition, Employment and Training Administration, United States Department of Labor, U.S. Department of Labor Training and Employment Guidance Letter No. TEGL 21-16, and CareerSource Florida Administrative Policy No. 109.

BACKGROUND

Supportive services, one of the fourteen program elements for the WIOA youth program, are services that enable an individual to participate in WIOA activities. These supportive services include but are not limited to assistance with transportation, childcare, housing, health care, educational testing, work-related attire, and work-related tools.

LOCAL POLICY

To help WIOA Youth program participants overcome barriers to employment and training services, supportive services may be provided to youth actively enrolled and participating in a training activity. Staff must assess the youth's financial need for supportive services during the initial objective assessment and throughout the youth's enrollment in career and training services. WIOA-funded supportive services may be provided to youth only after staff has determined and appropriately documented the following:

- Supportive services are necessary for the youth to complete the WIOA career or training services.
- The identified supportive service is not available through other agencies, programs, or services.
 - If available through other sources, staff must document how/why referrals to other agencies for the supportive service would create a hardship for the participant.
- Staff has documented the need for the supportive service in the participant's Individual Service Strategy (ISS) OR Individual Employment Plan (IEP).
- WIOA Youth participant has completed and signed a Statement of Need documenting the financial need for support and the cost of the requested supportive services. A copy of the form must be maintained in the participant's case file.
- Staff has recorded the appropriate code in the State's Management Information System, Employ Florida, along with a supporting case note documenting the need for the supportive service, as reflected in the IEP.

Staff must ensure supportive services provided are used for their intended purpose and must not be issued to a third party on behalf of the WIOA Youth participant. Supportive services are purchased directly from the appropriate vendor; CSRC does not reimburse youth for costs incurred. The availability of supportive services may vary with each program year and is based on WIOA Youth Program funding.



Due to limited WIOA Youth program funding, CSRC does not regularly authorize supportive service payments for housing expenses, childcare/dependent care, legal fees, fines, late fees, court costs, or any item not listed in the chart below. However, requests for support services not listed may be approved by the WIOA Youth Program Manager.

| SUPPORT SERVICE LIMITATIONS PER YOUTH PER PROGRAM YEAR | | |
|---|---|---|
| Support Service | Cost Limitation | Quantity Limitation |
| Uniforms | \$75 100.00 | 2 Tops, 2 Bottoms |
| Shoes | \$50.00 | One Pair |
| Safety Steel Toe Boots | \$75.00 | One Pair |
| Interview Attire | \$75 100.00 | 2 Tops, 2 Bottoms, and Shoes |
| Tools | \$100.00 | No Quantity Limitation |
| Background Screening | \$100.00 | No Quantity Limitation |
| Physicals/Drug Screening | \$100.00 | No Quantity Limitation |
| Bus Passes | \$35.00 | One Book Per Month Maximum |
| Gas Cards/ Uber Cards | Based on Mileage, Not to Exceed \$25 50.00 | One Per Month Maximum |
| Educational Testing, Licensing Fees, Required Textbooks | \$300.00 | No Quantity Limitation |
| Required Accommodations for Youth with Disabilities | No Predetermined Limit- Based on Documentation of Need and Manager approval | No Quantity Limitation |
| Driver's License, Permit, State ID | \$65.00 No Predetermined Limit. Based on actual cost. | No Quantity Limitation |

Reference Documents:

WIOA Youth - Supportive Services Procedure



PURPOSE

To establish a uniform standard for providing supportive services to Workforce Innovation & Opportunity Act (WIOA) Youth program participants of CareerSource Research Coast (CSRC). To avoid duplication, WIOA Youth Program staff shall coordinate and provide cost-effective support services to participants by either connecting participants to other resources or when appropriate WIOA funding is available. CSRC shall authorize supportive services when a participant demonstrates the financial need, when the participant will not be successful without the support, and when no alternative funding is available to pay for such supportive service.

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BACKGROUND

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To help WIOA Youth program participants overcome barriers to employment and training services, supportive services may be provided to youth actively enrolled and participating in a training activity. Staff must assess the youth's financial need for supportive services during the initial objective assessment and throughout the youth's enrollment in career and training services. WIOA-funded supportive services may be provided to youth only after staff has determined and appropriately documented the following:

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- The identified supportive service is not available through other agencies, programs, or services.
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- Staff has documented the need for the supportive service in the participant's Individual Service Strategy (ISS) OR Individual Employment Plan (IEP).
- WIOA Youth participant has completed and signed a Statement of Need documenting the financial need for support and the cost of the requested supportive services. A copy of the form must be maintained in the participant's case file.
- Staff has recorded the appropriate code in the State's Management Information System, Employ Florida, along with a supporting case note documenting the need for the supportive service, as reflected in the IEP.

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Due to limited WIOA Youth program funding, CSRC does not regularly authorize supportive service payments for housing expenses, childcare/dependent care, legal fees, fines, late fees, court costs, or any item not listed in the chart below. However, requests for support services not listed may be approved by the WIOA Youth Program Manager.

| SUPPORT SERVICE LIMITATIONS PER YOUTH PER PROGRAM YEAR | | |
|---|---|----------------------------|
| Support Service | Cost Limitation | Quantity Limitation |
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| Shoes | \$50.00 | One Pair |
| Safety Steel Toe Boots | \$75.00 | One Pair |
| Interview Attire | \$100.00 | 2 Tops, 2 Bottoms |
| Tools | \$100.00 | No Quantity Limitation |
| Background Screening | \$100.00 | No Quantity Limitation |
| Physicals/Drug Screening | \$100.00 | No Quantity Limitation |
| Bus Passes | \$35.00 | One Book Per Month Maximum |
| Gas Cards/Uber Cards | Based on Mileage, Not to Exceed \$50.00 | One Per Month Maximum |
| Educational Testing, Licensing Fees, Required Textbooks | \$300.00 | No Quantity Limitation |
| Required Accommodations for Youth with Disabilities | No Predetermined Limit- Based on Documentation of Need and Manager approval | No Quantity Limitation |
| Driver's License, Permit, State ID | No Predetermined Limit. Based on actual cost. | No Quantity Limitation |

Reference Documents:

WIOA Youth - Supportive Services Procedure

AGENDA ITEM SUMMARY

| | |
|------------------------------|--|
| Title | Review and Approve WIOA - Individual Training Account Policy |
| Strategic Plans/Goals | Optimal Use of Resources |
| Policy/Plan/Law | Workforce Innovation and Opportunity Act Section 134 (c)(3)(G)(ii) |
| Action Requested | Review and Approve WIOA - Individual Training Account Policy Revisions |
| Background | <p>The Workforce Innovation and Opportunity Act (WIOA) requires that individuals be provided an Individual Training Account (ITA) to pay for tuition, books and fees related to occupational skills training accessed through an approved training provider. CareerSource Florida requires that local boards establish policies related to the value of the ITA, cancellation, transferability, and limits that apply to these accounts.</p> <p>The ITA policy was revised to provide more concise guidance regarding the use of the ITA under WIOA within CSRC's Local Workforce Development Area (LWDA).</p> |
| Staff Recommendations | Review and Approve the WIOA Individual Training Account Policy Revisions |
| Supporting Material | WIOA - Individual Training Account Policy Revisions |
| Board Staff | Christina Coble WIOA Programs Manager ccoble@careesourcerc.com (866) 482-4473 ext. 617 |



WORKFORCE INNOVATION & OPPORTUNITY ACT
 INDIVIDUAL TRAINING ACCOUNT POLICY
 ORIGINAL APPROVAL DATE: 2/12/2014
 REVISION
 DATE: 02/17/2023

PURPOSE

To provide guidance on the use of Workforce Innovation and Opportunity Act (WIOA) Individual Training Accounts (ITA) for eligible and suitable career seekers determined in need of training. WIOA training services are provided to assist a career seeker in obtaining self-sufficient employment in their field of training. This policy establishes guidelines to promote successful training completion, certification/credential attainment and gainful employment.

REFERENCE

The Workforce Innovation and Opportunity Act of 2014 (WIOA), Sec.134(c)(3)(G)(ii), specifies that, with certain limited exemptions, all Title I Adult and Dislocated Worker training services shall be provided using Individual Training Accounts (ITAs).

BACKGROUND

The Workforce Innovation and Opportunity Act promotes career seeker choice and designates ITAs for that purpose. Career seekers determined eligible and suitable are issued an ITA for training programs in alignment with occupations identified on the Local Targeted Occupations List (LTOL) and included on the approved Eligible Training Provider List (ETPL). WIOA Section 134 states that training services may include a program of one or more classes or courses, or a structured regimen, that upon successful completion leads to a certification/credential, an associate of science degree, a baccalaureate degree, completion of a registered apprenticeship program, or the skills or competencies needed for a specific job or jobs, an occupation, an occupational group, or generally, for many types of jobs or occupations, as recognized by employers and determined prior to training.

Under WIOA, training services may be provided if CareerSource Research Coast (CSRC) staff determine, after an interview, evaluation, assessment, and career planning, that the individual:

- Is unlikely or unable to obtain or retain employment, that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment through career services alone;
- Needs training services to obtain or retain employment that leads to self-sufficiency or wages comparable to or higher than wages from previous employment; and
- Has the skills and qualifications to successfully participate in the selected program of training service.

WIOA requires that individuals be provided an ITA to pay for tuition, books and fees related to occupational skills training accessed through an approved training provider. Local boards must establish policies related to the value of the ITA, cancellation, transferability, and limits that apply to these accounts.

POLICY

CSRC has developed its ITA system to encourage and promote career pathways that lead to self-sufficiency. Assessment is mandatory to target services to the individual needs of the career seeker who is unable to find suitable employment with existing skills and/or academic credentials as evidenced through documented unsuccessful job search and placement. An Individual Employment Plan (IEP) must be developed by the Career Planner and participant detailing the role of the training (ITA) in preparing the participant for employment in a demand occupation included on the LTOL. The plan must be signed prior to the issuance of the ITA.

Priority will be given to ITAs for occupations in the following industry sectors identified by CSRC for targeted sector strategies initiatives as reflected in the current CSRC WIOA Local Plan:-

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment with Florida Relay Service at 711.

WIOA – Individual Training Account Policy – ~~March~~
 August 2023 Page 1 of 3

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WORKFORCE INNOVATION & OPPORTUNITY ACT
 INDIVIDUAL TRAINING ACCOUNT POLICY
 ORIGINAL APPROVAL DATE: 2/12/2014
 REVISION DATE: 02/17/2023
 BOARD EFFECTIVE DATE: 03/01/2023

An ITA tier system will be utilized to determine the maximum allowable amount of the ITA. All ITAs will be categorized using the average entry wage of the selected training program. The thresholds for allowable investment within a given Program Year will be categorized in the following two tiers*:

| TIER | AVG ENTRY WAGE FOR LWDA | MAXIMUM ITA INVESTMENT |
|---------------|--|---|
| Tier 1 | \$13.00* to \$15.00 per hour | Up to \$3,500** |
| Tier 2 | \$15.01+ per hour | Up to \$5,000** |
| <u>Tier 3</u> | <u>Related Instruction for Registered Apprenticeship</u> | <u>Actual Cost of Related Instruction</u> |

*ITA's may be awarded at the Tier 1 amount for those occupations whose entry wage is not at the designated level when the training program provides a career pathway for an occupation designated in the LWDA's industry sectors. The training must be included on the CSRC ETPL.

**Funding that exceeds the maximum ITA investment may be recommended by the ITA Committee on a case-by-case basis for clients with significant barriers to employment, with approval granted by the President/CEO, Vice President of Operations/COO, or the CFO.

To be eligible for an ITA, the following criteria must be met:

1. The career seeker must not have received an ITA in the past 24 months.
2. The career seeker must be a resident of the CSRC service delivery area to receive an ITA. An exception may be made to award an ITA to eligible and suitable career seekers who are residents of other CareerSource LWDA's when each of the following conditions are met:
 - a. The purpose of the ITA is for specialized sector training as specified by WIOA funding awarded through grants and/or specialized projects.
 - b. A partnership with the Local Workforce Development Board governing the LWDA in which the career seeker resides has been established and documented.
3. The career seeker has been determined through formal assessment(s), interviews, and career planning, to be an appropriate match and possess the aptitude to complete the selected training program, obtain the appropriate certification/credential, and be eligible for hire in training related employment.
4. As part of the suitability determination process, career seekers must demonstrate the ability to self-sustain financially for the length of the training until employment is gained and be able to cover the training amount above CSRC funds.
5. The selected training program and training provider is listed on the ETPL and is within the LWDA's commuting area.
6. The career seeker must select an eligible training program offered by an eligible training provider, which upon completion of training, leads to an industry-recognized certification, credential, or degree.
7. On an annual basis, or in the case of scholarships, as they become available, the career seeker must apply for other training assistance (for example: Pell Grant, scholarships and employer-sponsored training) to help assist with the cost of training and training related support. Any scholarships or grants received will be applied toward the total allowable tuition, books, and fees prior to determining the ITA amount.
8. The career seeker will only receive one (1) ITA to complete the training program for which they are deemed suitable and eligible. If the career seeker has completed such program and is requesting additional funding to upgrade their program and continue on a career pathway, additional funding may be awarded, provided it is not for a graduate

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers may be reached by persons using TTY/TDD equipment with Florida Relay Service at 711.



8. _____ degree. Note: Individuals who have degrees in current demand occupations, employed full-time and have years of experience in their field are not appropriate for consideration of additional training. Consideration will be given to _____

9. _____

individuals who have outdated credentials and/or credentials in occupations not considered high wage/high skills as referenced on the LTOL and are determined under-employed. Career seekers who meet one of the following conditions are considered under-employed:

- Individuals employed less than full-time who are seeking full-time employment;
- Individuals who are employed in a position that is inadequate with respect to their skills and training;
- Individuals who are employed who meet the definition of low-income individual;
- Individuals who are employed, but whose current job's earnings are not sufficient compared to their previous job's earnings from their employment, per state and/or local policy.

10.9. _____ The duration of the ITA cannot exceed 12 months. In conjunction with the Career Planner, the career seeker must develop a documented educational plan that ensures completion of the training program within the allowable 12- month timeframe. Note: An exception may be considered upon approval of the WIOA Programs Manager when a participant has documented needs or barriers which require an ITA for longer than 12 months. Additionally, an extension may be considered in the case of medical issues, military deployment, or other life changing events that alter the scheduled plan of completion for the training program. This extension must be approved, in advance, by the WIOA Programs Manager or the Vice President of Operations. CSRC reserves the right to limit the number of semesters/terms and the amount of funding provided based on length of training, cost of training programs and availability of funds.

14.10. _____ Payments to training providers made on behalf of ITA participants will be on an individual class or per-semester basis. Participants must provide documentation of successful completion of prior semester/term coursework before a subsequent payment may be made.

12.11. _____ Career seekers must demonstrate satisfactory progress throughout the duration of the training to continue receiving WIOA funding. Satisfactory progress for the purpose of this policy is defined as maintaining a "C" average for each approved class on an official transcript or grade report. If the career seeker does not perform as expected, the ITA may be withdrawn until such time the grade level in each class returns to a "C" (2.0) and documentation provided to the Career Planner.

All ITAs are subject to the availability of funds and issued for the current program year only. CSRC cannot provide a guarantee of continued funding as funds used to provide training are based on federal/state dollars' availability.

The use of ITAs for occupational skills training is subject to the Priority of Service procedures defined by

WIOA. ITAs are not transferable.

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PURPOSE

To provide guidance on the use of Workforce Innovation and Opportunity Act (WIOA) Individual Training Accounts (ITA) for eligible and suitable career seekers determined in need of training. WIOA training services are provided to assist a career seeker in obtaining self-sufficient employment in their field of training. This policy establishes guidelines to promote successful training completion, certification/credential attainment and gainful employment.

REFERENCE

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BACKGROUND

The Workforce Innovation and Opportunity Act promotes career seeker choice and designates ITAs for that purpose. Career seekers determined eligible and suitable are issued an ITA for training programs in alignment with occupations identified on the Local Targeted Occupations List (LTOL) and included on the approved Eligible Training Provider List (ETPL). WIOA Section 134 states that training services may include a program of one or more classes or courses, or a structured regimen, that upon successful completion leads to a certification/credential, an associate of science degree, a baccalaureate degree, completion of a registered apprenticeship program, or the skills or competencies needed for a specific job or jobs, an occupation, an occupational group, or generally, for many types of jobs or occupations, as recognized by employers and determined prior to training.

Under WIOA, training services may be provided if CareerSource Research Coast (CSRC) staff determine, after an interview, evaluation, assessment, and career planning, that the individual:

- Is unlikely or unable to obtain or retain employment, that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment through career services alone;
- Needs training services to obtain or retain employment that leads to self-sufficiency or wages comparable to or higher than wages from previous employment; and
- Has the skills and qualifications to successfully participate in the selected program of training service.

WIOA requires that individuals be provided an ITA to pay for tuition, books and fees related to occupational skills training accessed through an approved training provider. Local boards must establish policies related to the value of the ITA, cancellation, transferability, and limits that apply to these accounts.

POLICY

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Priority will be given to ITAs for occupations in the following industry sectors identified by CSRC for targeted sector strategies initiatives as reflected in the current CSRC WIOA Local Plan:



An ITA tier system will be utilized to determine the maximum allowable amount of the ITA. All ITAs will be categorized using the average entry wage of the selected training program. The thresholds for allowable investment within a given Program Year will be categorized in the following two tiers*:

| TIER | AVG ENTRY WAGE FOR LWDA | MAXIMUM ITA INVESTMENT |
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| Tier 3 | Related Instruction for Registered Apprenticeship | Actual Cost of Related Instruction |

**ITA's may be awarded at the Tier 1 amount for those occupations whose entry wage is not at the designated level when the training program provides a career pathway for an occupation designated in the LWDA's industry sectors. The training must be included on the CSRC ETPL.*

***Funding that exceeds the maximum ITA investment may be recommended by the ITA Committee on a case-by-case basis for clients with significant barriers to employment, with approval granted by the President/CEO, Vice President of Operations/COO, or the CFO.*

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 - b. A partnership with the Local Workforce Development Board governing the LWDA in which the career seeker resides has been established and documented.
3. The career seeker has been determined through formal assessment(s), interviews, and career planning, to be an appropriate match and possess the aptitude to complete the selected training program, obtain the appropriate certification/credential, and be eligible for hire in training related employment.
4. As part of the suitability determination process, career seekers must demonstrate the ability to self-sustain financially for the length of the training until employment is gained and be able to cover the training amount above CSRC funds.
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7. On an annual basis, or in the case of scholarships, as they become available, the career seeker must apply for other training assistance (for example: Pell Grant, scholarships and employer-sponsored training) to help assist with the cost of training and training related support. Any scholarships or grants received will be applied toward the total allowable tuition, books, and fees prior to determining the ITA amount.
8. The career seeker will only receive one (1) ITA to complete the training program for which they are deemed suitable and eligible. If the career seeker has completed such program and is requesting additional funding to upgrade their program and continue on a career pathway, additional funding may be awarded, provided it is not for a graduate

degree. Note: Individuals who have degrees in current demand occupations, employed full-time and have years of experience in their field are not appropriate for consideration of additional training. Consideration will be given to individuals who have outdated credentials and/or credentials in occupations not considered high wage/high skills as referenced on the LTOL and are determined under-employed. Career seekers who meet one of the following conditions are considered under-employed:

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 - Individuals who are employed in a position that is inadequate with respect to their skills and training;
 - Individuals who are employed who meet the definition of low-income individual;
 - Individuals who are employed, but whose current job's earnings are not sufficient compared to their previous job's earnings from their employment, per state and/or local policy.
9. The duration of the ITA cannot exceed 12 months. In conjunction with the Career Planner, the career seeker must develop a documented educational plan that ensures completion of the training program within the allowable 12-month timeframe. Note: An exception may be considered upon approval of the WIOA Programs Manager when a participant has documented needs or barriers which require an ITA for longer than 12 months. Additionally, an extension may be considered in the case of medical issues, military deployment, or other life changing events that alter the scheduled plan of completion for the training program. This extension must be approved, in advance, by the WIOA Programs Manager or the Vice President of Operations. CSRC reserves the right to limit the number of semesters/terms and the amount of funding provided based on length of training, cost of training programs and availability of funds.
10. Payments to training providers made on behalf of ITA participants will be on an individual class or per-semester basis. Participants must provide documentation of successful completion of prior semester/term coursework before a subsequent payment may be made.
11. Career seekers must demonstrate satisfactory progress throughout the duration of the training to continue receiving WIOA funding. Satisfactory progress for the purpose of this policy is defined as maintaining a "C" average for each approved class on an official transcript or grade report. If the career seeker does not perform as expected, the ITA may be withdrawn until such time the grade level in each class returns to a "C" (2.0) and documentation provided to the Career Planner.

All ITAs are subject to the availability of funds and issued for the current program year only. CSRC cannot provide a guarantee of continued funding as funds used to provide training are based on federal/state dollars' availability.

The use of ITAs for occupational skills training is subject to the Priority of Service procedures defined by

WIOA. ITAs are not transferable.

AGENDA ITEM SUMMARY

| | |
|-----------------------|--|
| Title | LWDB 20 Primary Indicators of Performance for Program Year (PY) 2022-2023 3rd Quarter |
| Strategic Plans/Goals | Clear, Credible, and Trustworthy Commitments and Projects |
| Policy/Plan/Law | Workforce Innovation and Opportunity Act (WIOA) Title I Programs and Title III Wagner-Peyser (WP) Act; Training and Employment Guidance Letter No. 09-20 |
| Action Requested | None - Information Only |
| Background | <p>The State of Florida must negotiate and agree upon performance levels for WIOA, and WP programs funded by the United States Department of Labor, Employment, and Training Administration. Once the state levels are established, the Department of Commerce must negotiate and reach agreements with the Local Workforce Development Boards for their local performance targets.</p> <p>Staff will review CareerSource Research Coast's performance for the 3rd quarter of PY2022-2023.</p> |
| Staff Recommendations | None - Information Only |
| Supporting Material | LWDB 20 PY2022-2023 3rd Quarter Performance |
| Board Staff | <p>Shelly Batton Director of Programs/Equal Opportunity Officer sbatton@careersourcerc.com (866) 482-4473 ext. 518</p> |

LWDB 20

| Measures | PY2021-2022 4th Quarter Performance | PY2021-2022 % of Performance Goal Met For Q4 | PY2021-2022 Performance Goals | PY2022-2023 1st Quarter Performance | PY2022-2023 % of Performance Goal Met For Q1 | PY2022-2023 2nd Quarter Performance | PY2022-2023 % of Performance Goal Met For Q2 | PY2022-2023 3rd Quarter Performance | PY2022-2023 % of Performance Goal Met For Q3 | PY2022-2023 Performance Goals |
|------------------------------------|---|--|-------------------------------------|---|--|---|--|---|--|-------------------------------------|
| Adults: | | | | | | | | | | |
| Employed 2nd Qtr After Exit | 91.80 | 96.63 | 95.00 | 90.9 | 99.24 | 89.90 | 98.14 | 87.90 | 95.96 | 91.60 |
| Median Wage 2nd Quarter After Exit | \$12,545 | 140.96 | \$8,900 | \$11,826 | 128.50 | \$11,925 | 129.58 | \$11,925 | 129.58 | \$9,203 |
| Employed 4th Qtr After Exit | 92.80 | 97.68 | 95.00 | 94.9 | 104.17 | 88.30 | 96.93 | 88.30 | 96.93 | 91.10 |
| Credential Attainment Rate | 93.40 | 131.55 | 71.00 | 92.9 | 105.57 | 89.70 | 101.93 | 88.60 | 100.68 | 88.00 |
| Measurable Skill Gains | 100.00 | 149.25 | 67.00 | 85.6 | 100.35 | 85.40 | 100.12 | 77.00 | 90.27 | 85.30 |
| Dislocated Workers: | | | | | | | | | | |
| Employed 2nd Qtr After Exit | 78.60 | 87.33 | 90.00 | 76.00 | 86.36 | 74.10 | 84.20 | 78.60 | 89.32 | 88.00 |
| Median Wage 2nd Quarter After Exit | \$10,109 | 129.60 | \$7,800 | \$10,858.00 | 125.70 | \$11,511 | 133.26 | \$11,214 | 129.82 | \$8,638 |
| Employed 4th Qtr After Exit | 100.00 | 114.94 | 87.00 | 100.00 | 108.11 | 82.10 | 88.76 | 84.00 | 90.81 | 92.50 |
| Credential Attainment Rate | 100.00 | 142.86 | 70.00 | 100.00 | 132.63 | 93.80 | 124.40 | 93.80 | 124.40 | 75.40 |
| Measurable Skill Gains | 100.00 | 138.89 | 72.00 | 100.00 | 129.37 | 92.30 | 119.40 | 100.00 | 129.37 | 77.30 |
| Youth: | | | | | | | | | | |
| Employed 2nd Qtr After Exit | 76.90 | 96.13 | 80.00 | 74.80 | 92.12 | 66.90 | 82.39 | 64.70 | 79.68 | 81.20 |
| Median Wage 2nd Quarter After Exit | \$3,349 | 98.50 | \$3,400 | \$3,050.00 | 93.53 | \$3,453 | 105.89 | \$3,041 | 93.25 | \$3,261 |
| Employed 4th Qtr After Exit | 82.20 | 105.38 | 78.00 | 82.40 | 104.57 | 67.80 | 86.04 | 69.50 | 88.20 | 78.80 |
| Credential Attainment Rate | 100.00 | 108.70 | 92.00 | 100.00 | 113.38 | 100.00 | 113.38 | 100.00 | 113.38 | 88.20 |
| Measurable Skill Gains | 96.60 | 132.33 | 73.00 | 92.90 | 114.69 | 86.00 | 106.17 | 88.20 | 108.89 | 81.00 |
| Wagner Peyser: | | | | | | | | | | |
| Employed 2nd Qtr After Exit | 65.00 | 95.59 | 68.00 | 63.00 | 96.48 | 61.90 | 94.79 | 63.50 | 97.24 | 65.30 |
| Median Wage 2nd Quarter After Exit | \$6,936 | 136.00 | \$5,100 | \$6,686.00 | 120.69 | \$6,734.00 | 121.55 | \$6,989 | 126.16 | \$5,540 |
| Employed 4th Qtr After Exit | 64.20 | 93.04 | 69.00 | 68.60 | 109.58 | 65.20 | 104.15 | 64.30 | 102.72 | 62.60 |

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|---|
| Not Met (less than 90% of negotiated) |
| Met (90-100% of negotiated) |
| Exceeded (greater than 100% of negotiated) |

AGENDA ITEM SUMMARY

| | |
|-----------------------|---|
| Title | CareerSource Research Coast (CSRC) Program Updates |
| Strategic Plans/Goals | Strategic Planning, Commitments, and Projects |
| Policy/Plan/Law | Workforce Development Board of the Treasure Coast By-Laws |
| Action Requested | None - Information only |
| Background | <p>The primary functions of the Program and Services Committee shall be to coordinate workforce development activities with regional economic development strategies and increase accountability by assuring that education and workforce development activities in the area are effective and relevant to current and future labor market needs.</p> <p>Staff will provide an update on CSRC programs and current initiatives.</p> |
| Staff Recommendations | None - Information Only |
| Supporting Material | None - Information Only |
| Board Staff | <p>Shelly Batton Director of Programs sbatton@careersourcerc.com (866) 482-4473 ext. 518</p> |